

# 2012 RESIDENT STUDY



***Creative Consumer Research***

3945 Greenbriar Stafford, TX 77477

[www.ccrsurveys.com](http://www.ccrsurveys.com)

June 2012

# The Woodlands Residential Survey 2012

- Traditionally conduct survey every two years
- Township board approved questionnaire and RFP in February 2012
- Proposals received from four companies
- Companies reviewed and rated based on criteria in RFP
- Creative Consumer Research (CCR) scored highest in meeting the criteria to conduct the survey and was competitively priced
- Board approved CCR to conduct survey
- Survey conducted April 4-30, 2012

# About the Survey Company

# Creative Consumer Research

*For more than 30 years, Creative Consumer Research has been providing clients with high-quality research data and analysis at competitive prices.*

- CCR's extensive experience crosses a multitude of industries that includes long-term relationships with clients such as: The Woodlands, First Colony, City of Sugar Land, City of Austin.
- CCR is different from most other full-service market research firms today in that:
  - All aspects of a study are conducted in-house by the company's own staff of market research professionals and data collection personnel;
  - The company has 13 years experience working with The Woodlands;
  - CCR's Senior Executive (Joyce Walter) and Research Analyst (Joy Durham) have been working with The Woodlands for 13 and 10 years, respectively.
- CCR's researchers have extensive experience and strong backgrounds in various research techniques, both qualitative and quantitative.

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# Objectives

# Objectives

- The major objective of this research project is to obtain resident opinions on various issues related to living in The Woodlands Township, including:
  - Satisfaction with available services;
  - Issues of priority;
  - Satisfaction with delivery of services;
  - Use of existing community facilities and amenities;
  - Identifying any changes occurring since the 2010, 2008, 2005, and 2004 Residents Surveys where appropriate.



# Methodology

# Methodology

- CCR conducted 1,061 telephone interviews with residents of The Woodlands Township:
  - Alden Bridge N=151
  - Cochran's Crossing N=151
  - Grogan's Mill N=150
  - Panther Creek N=151
  - Sterling Ridge N=151
  - Indian Springs N=126
  - College Park N=127
  - Creekside Park N=50
  - Town Center N=2
  - Carlton Woods N=2
  - *For reporting purposes, Carlton Woods is grouped with Sterling Ridge*

# Methodology

- Requirements for participation:
  - Currently reside in one of pre-listed villages in The Woodlands Township
  - Head of household
  - Live in single family residence
  - Respondent/family/household members do not work in:
    - Market Research
    - Advertising
    - Public Relations
  - Respondent/family/household members have never served on/in an Association/Board or been employed by The Woodlands Township

# Methodology

- Respondents were randomly called from a database of listed and unlisted households obtained by CCR
  - Respondents informed of the study sponsor
  - Given a telephone number to call with any questions
  - Interviewing dates: April 4 – 30, 2012

# Methodology

- CCR Responsibilities:
  - Design questionnaire
  - Conduct interviewing from CCR Houston call center
  - Validate surveys
  - Data processing and analysis
  - Report and presentation
  - Significance testing
    - 95% confidence level
    - Performed for current year (2012) versus previous year (2010) results only in comparison section

# Methodology

- Marks of significance seen throughout the report are as follows unless otherwise noted:
  - “\*”--Significantly greater than all others in category
  - “+”--Significantly different from 2010 results
  - “P”--Significantly different from Panther Creek
  - “G”--Significantly different from Grogan’s Mill
  - “C”--Significantly different from Cochran’s Crossing
  - “I”--Significantly different from Indian Springs
  - “A”--Significantly different from Alden Bridge
  - “S”--Significantly different from Sterling Ridge/Carlton Woods
  - “H”--Significantly different from College Park
  - Differences between villages are highlighted for easy identification throughout the report
  - Significance testing was not performed for other areas due to small base sizes

# Respondent Profile

CHART  
1 OF 3

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
<b>GENDER</b>									
Male	42%	36%	46%	47%	41%	41%	37%	39%	52%
Female	58%	64%	54%	53%	59%	59%	63%	61%	48%
<b>AVERAGE RESPONDENT AGE</b>	53	52	54	57	56	48	52	54	48
<b>AVERAGE HOUSEHOLD INCOME</b>	\$127,510	\$121,320	\$135,420	\$106,800	\$125,700	\$142,800	\$140,820	\$114,530	\$140,680
<b>OWN CURRENT RESIDENCE</b>	94%	94%	97%	91%	94%	92%	95%	91%	98%
<b>AVERAGE NUMBER OF YEARS LIVED IN THE WOODLANDS</b>									
Mean	11.39	9.73	12.99	15.56	16.27	7.42	11.11	8.63	4.71
Median	8.14	8.69	10.87	12.38	14.03	4.57	8.52	6.06	1.66
<b>AVERAGE NUMBER OF PEOPLE IN HOUSEHOLD</b>	2.95	2.97	2.97	2.49	2.51	3.57	3.18	2.84	3.16
<b>AVERAGE NUMBER OF CHILDREN IN HOUSEHOLD</b>	0.91	1.03	0.71	0.52	0.56	1.36	1.11	0.94	1.10
<b>HOUSEHOLDS WITH NO CHILDREN</b>	52%	48%	55%	66%	69%	36%	45%	52%	42%

# Respondent Profile (continued)

CHART  
2 OF 3

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
AVERAGE NUMBER OF PEOPLE IN HOUSEHOLD WORKING IN THE WOODLANDS	0.58	0.53	0.59	0.61	0.57	0.65	0.63	0.48	0.45
AVERAGE MILES ROUNTRIP FOR WORK COMMUTE <u>INSIDE</u> TOWNSHIP	Total Sample (N=449)	Alden Bridge (N=57)	Cochran's Crossing (N=66)	Grogan's Mill (N=66)	Panther Creek (N=61)	Sterling Ridge/ Carlton Woods (N=74)	Indian Springs (N=59)	College Park (N=48)	Creekside Park (N=18)
First person in household	10	11	7	7	7	16	7	12	16
AVERAGE NUMBER OF PEOPLE IN HOUSEHOLD WORKING OUTSIDE OF THE WOODLANDS	0.71	0.75	0.78	0.63	0.63	0.77	0.70	0.69	0.82
AVERAGE MILES ROUNTRIP FOR WORK COMMUTE <u>OUTSIDE</u> TOWNSHIP	Total Sample (N=586)	Alden Bridge (N=83)	Cochran's Crossing (N=86)	Grogan's Mill (N=66)	Panther Creek (N=73)	Sterling Ridge/ Carlton Woods (N=98)	Indian Springs (N=75)	College Park (N=68)	Creekside Park (N=37)
First person in household	57	63	57	54	53	58	64	50	52

Q43./Q43a./Q44./Q45a.



# Respondent Profile (continued)

CHART  
3 OF 3

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
<b>MARITAL STATUS</b>									
Married	81%	76%	86%	71%	78%	90%	81%	81%	92%
Single	6%	8%	1%	9%	7%	3%	7%	6%	4%
Separated/Divorced	5%	5%	3%	9%	5%	3%	4%	5%	0%
Widowed	5%	5%	5%	8%	8%	1%	6%	7%	2%
<b>HIGHEST LEVEL OF EDUCATION</b>									
High school or less	5%	7%	6%	6%	5%	2%	3%	7%	6%
Some college	19%	19%	13%	29%	22%	12%	13%	30%	13%
Bachelor's degree	37%	36%	36%	31%	36%	43%	44%	32%	46%
Some post graduate	7%	10%	7%	8%	5%	4%	9%	6%	4%
Post graduate degree	29%	24%	34%	24%	29%	37%	30%	23%	29%

# Total Sample Dialing Information

Disposition	# Dialings	% of Total Dialngs
No Answer	6298	19.32
Busy	1100	3.38
Answering Machine	15236	46.75
Wrong Number	505	1.55
Generic Call Back	463	1.42
Disconnect	3921	12.03
Appointment Call Back	1225	3.76
Initial Refusal	1859	5.70
Terminate in Middle	62	0.19
Language Barrier	73	0.22
Fax/Modem/Business	471	1.45
Qualified Refusal	109	0.33
Call Block/Blocked number	11	0.03
Over Quota	14	0.04
Complete	1061	3.26
Q1A - Not male/female head of household	9	0.03
Q2- Not Woodlands resident	31	0.10
Q3 - Do not live in a house	43	0.13
Q4 - Works for Woodlands or in marketing	101	0.31
Q5 - Do not live in accepted village	0	0
<b>TOTAL DIALINGS</b>	<b>32,592</b>	<b>100.00</b>

Ratio of Total Dialings to completed surveys	
<b>2012 RATIO</b>	31:1
2010 RATIO	21:1
2008 RATIO	21:1
2005 RATIO	13:1
2004 RATIO	16:1
2002 RATIO	11:1
2000 RATIO	10:1
1999 RATIO	9:1

*\*For this study, it required 31 telephone dialings to get a completed interview with a resident*

# Conclusions & Recommendations

# Conclusions

- Many concerns that arose in the 2010 survey have subsided to pre-2010 standings while satisfaction levels with staff and services have risen
- As in past years, residents of The Woodlands Township continue to be pleased with living in The Township overall
  - The surrounding beauty, convenient location, and sense of safety contribute to the continued satisfaction levels
- Residents continue to rely on hometown publications such as The Woodlands Community Magazine and The Villager for community information
- Residents are highly satisfied with the services The Township provides
- Residents welcome economic development

# Recommendations

- Following the transition period to a Township, The Woodlands Township seems to have met the challenge of residents' trust and approval. But, the goal going forward becomes maintaining the high satisfaction levels.
  - Safety/Crime: Crime is no longer the top issue but is equal to traffic concerns. However, both issues can be effectively addressed and monitored with continued law enforcement presence and involvement.
  - Traffic: Traffic is a top concern for many. Continue to work with the County and other agencies to influence traffic signal patterns and improve traffic flow throughout the community.

# Recommendations

- Customer Service: In 2010 residents raised the bar in terms of what they expected from a government entity as opposed to an HOA. The Township now has to continue to be visible to promote how The Township staff is working for residents.
- Contact: Maintain satisfaction with The Township staff. Continue to offer multiple methods residents can use to contact staff: face-to-face, phone, and email.
- Development: Residents recognize the importance of economic development for The Township.

# Research Findings 2012 Results

# Community Services



# Community Assessment Rating/Services

- Overall, residents are satisfied with most of the provided services
  - Eleven of the 14 services average a 4 or 5 rating on a 5-point scale
    - At least 80% rate Pathways, Parks and Open Spaces, Recycling Collection, and Garbage Collection a 4 or 5; this is similar to past studies
  - 91% rate the Township as good to excellent in terms of services provided

# Rating Community Services

(1 = Poor; 5 = Excellent)

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Fire Department	4.69	4.73	4.80GH	4.62	4.68	4.69	4.69	4.59	4.74
Emergency Medical Services	4.58	4.56	4.67	4.59	4.57	4.53	4.58	4.59	4.42
Recycling Collection	4.57	4.53	4.61	4.47P	4.68	4.58	4.52	4.59	4.62
Garbage Collection	4.56	4.55	4.61	4.49	4.63	4.48	4.59	4.55	4.58
Parks and Open Space	4.51	4.57	4.58GH	4.41	4.55	4.51	4.48	4.39	4.71
Swimming Pools	4.35	4.33	4.46G	4.20	4.34	4.32	4.44G	4.27	4.68
Recreation Facilities	4.33	4.34	4.31	4.16	4.34	4.37G	4.43G	4.27	4.62
Pathways	4.32	4.38	4.41GH	4.21	4.28	4.41H	4.44GH	4.17	4.20
Recreation Programs	4.27	4.41GH	4.28	4.17	4.26	4.27	4.37H	4.11	4.34
Streetscape Maintenance	4.14	4.20G	4.14	3.97	4.09	4.17	4.24G	4.09	4.37
Law Enforcement in General	4.11	4.15	4.06	4.10	4.12	4.06	4.08	4.19	4.17
Traffic Enforcement	3.77	3.84	3.80	3.70	3.65	3.84	3.70	3.81	3.78
Deed Restrictions Enforcement	3.75	3.84G	3.84G	3.47	3.58	3.91GP	3.68	3.78G	4.13
Neighborhood Watch	3.64	3.60	3.81	3.52	3.57	3.76	3.53	3.51	4.00

# Rated Community Services a '4' or '5'

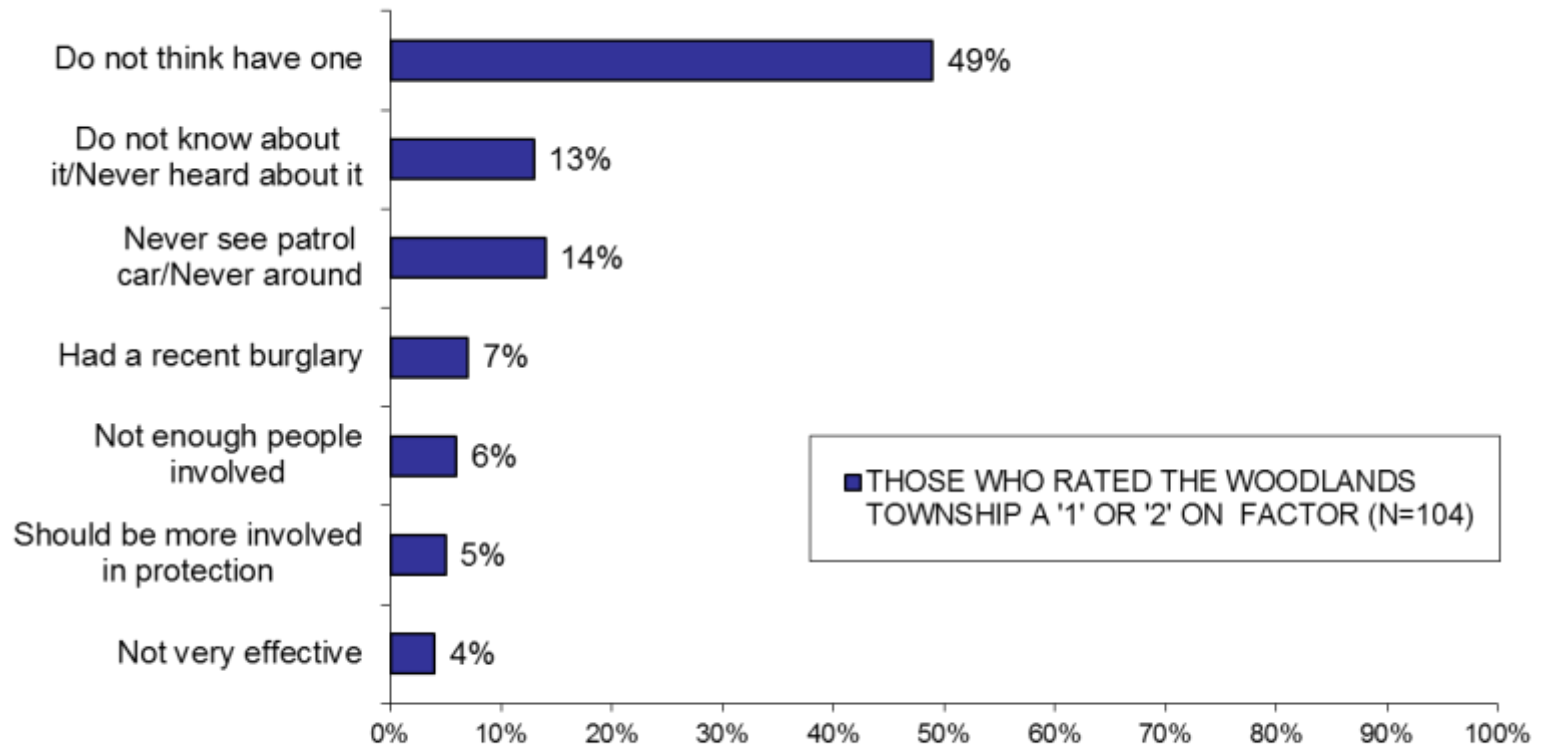
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Garbage Collection	91%	93%	91%	90%	93%	87%	93%	91%	92%
Recycling Collection	91%	91%	91%	85%	91%	92%	88%	93%	96%
Parks and Open Space	89%	90%	91%	85%	92%	90%	88%	83%	94%
Pathways	82%	81%	86%	79%	82%	86%	86%	74%	75%
Streetscape Maintenance	77%	79%	77%	70%	77%	79%	85%	75%	81%
Recreation Facilities	76%	77%	76%	67%	75%	82%	77%	69%	92%
Fire Department	75%	70%	79%	72%	80%	78%	75%	76%	69%
General Law Enforcement	73%	75%	72%	69%	74%	71%	74%	74%	69%
Emergency Medical Services	69%	64%	72%	73%	74%	70%	67%	69%	62%
Recreation Programs	67%	78%	70%	63%	65%	71%	67%	54%	75%
Traffic Enforcement	61%	66%	64%	59%	58%	63%	61%	57%	63%
Swimming Pools	59%	60%	58%	51%	55%	69%	63%	57%	69%
Deed Restriction Enforcement	57%	58%	61%	45%	52%	63%	60%	57%	73%
Neighborhood Watch	40%	38%	41%	32%	44%	50%	35%	37%	42%

Q6. Closed-ended rating question

# Rated Community Services a '1' or '2'

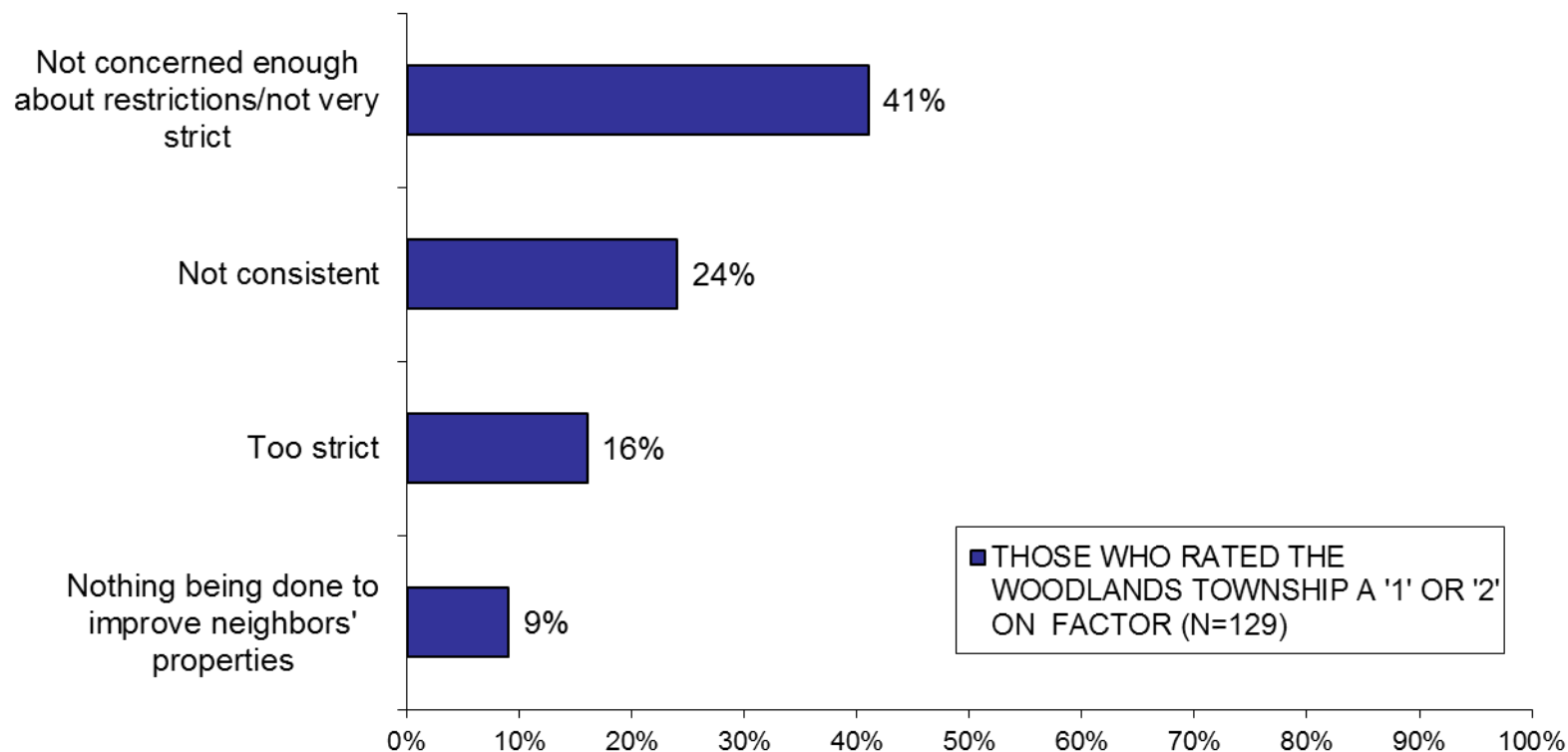
	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Traffic Enforcement	12%	11%	12%	16% <b>S</b>	11%	7%	15% <b>S</b>	9%	17%
Deed Restrictions Enforcement	12%	8%	14%	18%	14%	10%	13%	9%	8%
Neighborhood Watch	10%	11% <b>C</b>	5%	11% <b>C</b>	13%	10%	9%	12%	4%
General Law Enforcement	5%	9% <b>I</b>	5%	5%	7%	6%	2%	4%	4%
Recycling Collection	2%	4%	2%	3%	1%	1%	2%	2%	0%
Streetscape Maintenance	5%	5%	5%	6%	6%	5%	4%	8%	2%
Garbage Collection	3%	3%	3%	3%	3%	3%	2%	2%	0%
Pathways	4%	3%	3%	7% <b>S</b>	4%	1%	3%	6% <b>S</b>	6%
Recreation Facilities	3%	3%	3%	5%	1%	3%	2%	2%	0%
Swimming Pools	2%	1%	1%	4% <b>I</b>	1%	3%	0%	4% <b>I</b>	0%
Recreation Programs	3%	3%	3%	6%	2%	3%	2%	3%	2%
Fire Department	0%	1%	0%	0%	0%	0%	0%	1%	0%
Emergency Medical Services	1%	2%	0%	1%	1%	1%	1%	0%	2%
Parks and Open Space	2%	1%	1%	3%	1%	1%	3%	2%	2%

# Reasons Rated Neighborhood Watch as 'Poor'

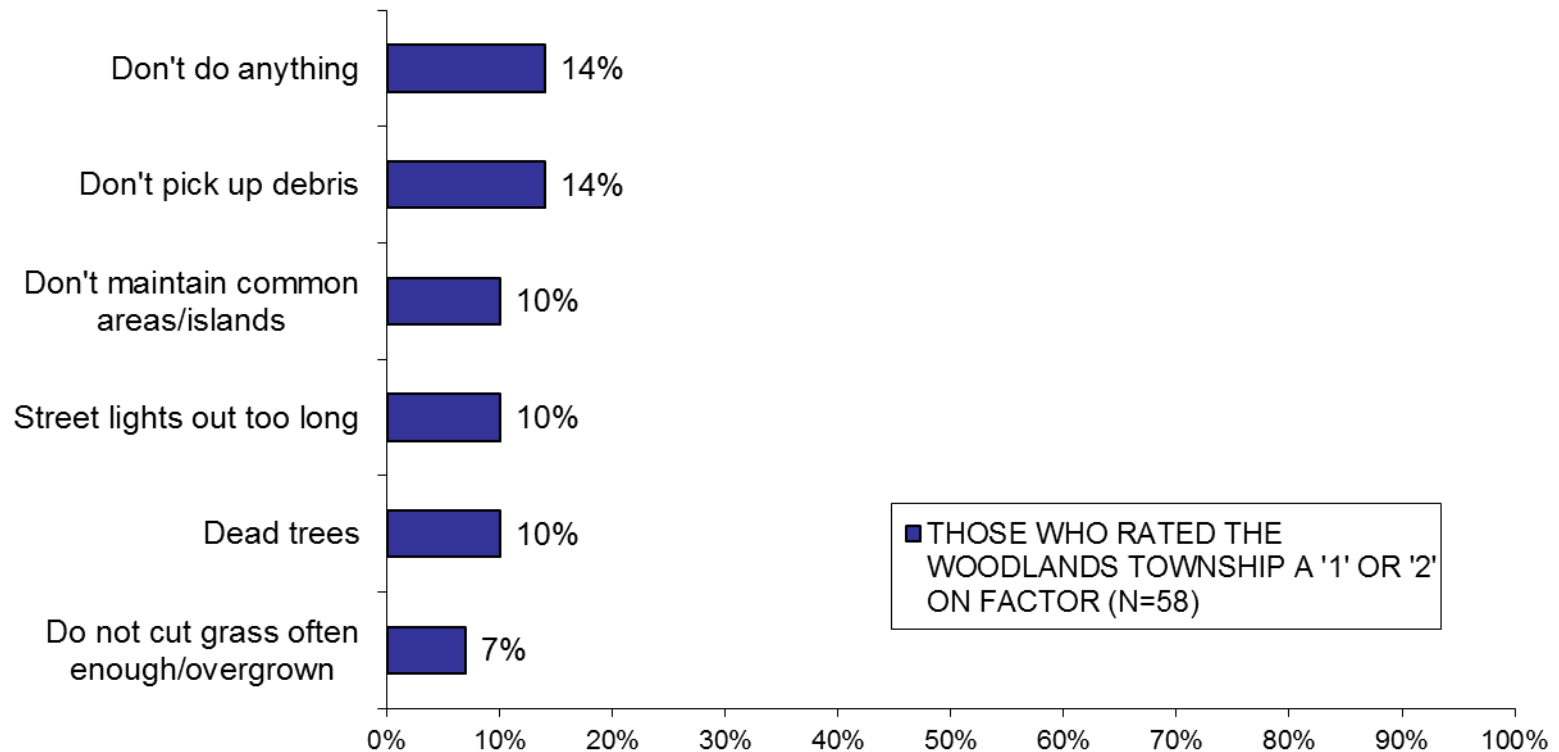


Q7. Open-ended question

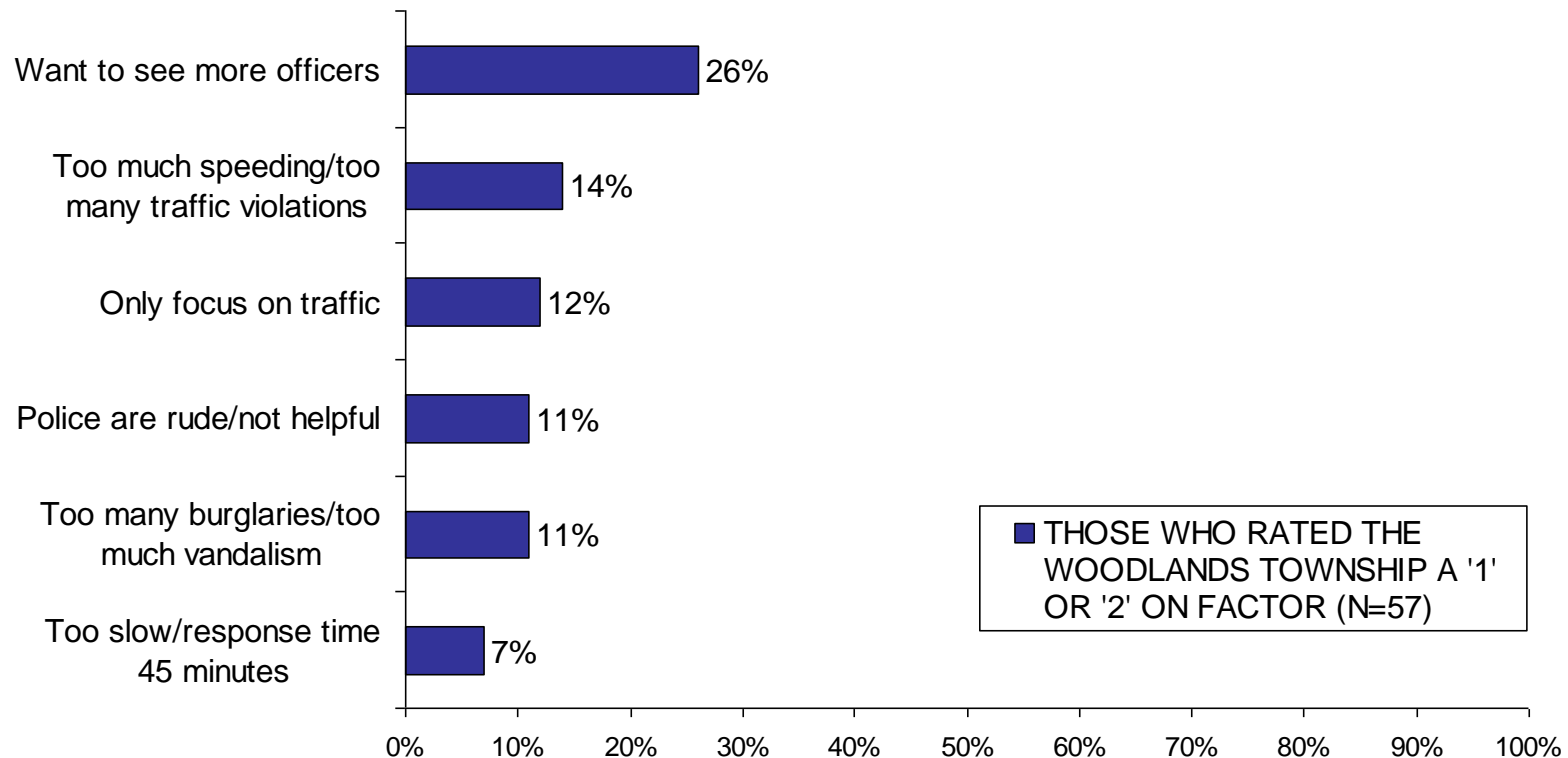
# Reasons Rated Deed Restrictions Enforcement as 'Poor'



# Reasons Rated Street Maintenance as 'Poor'

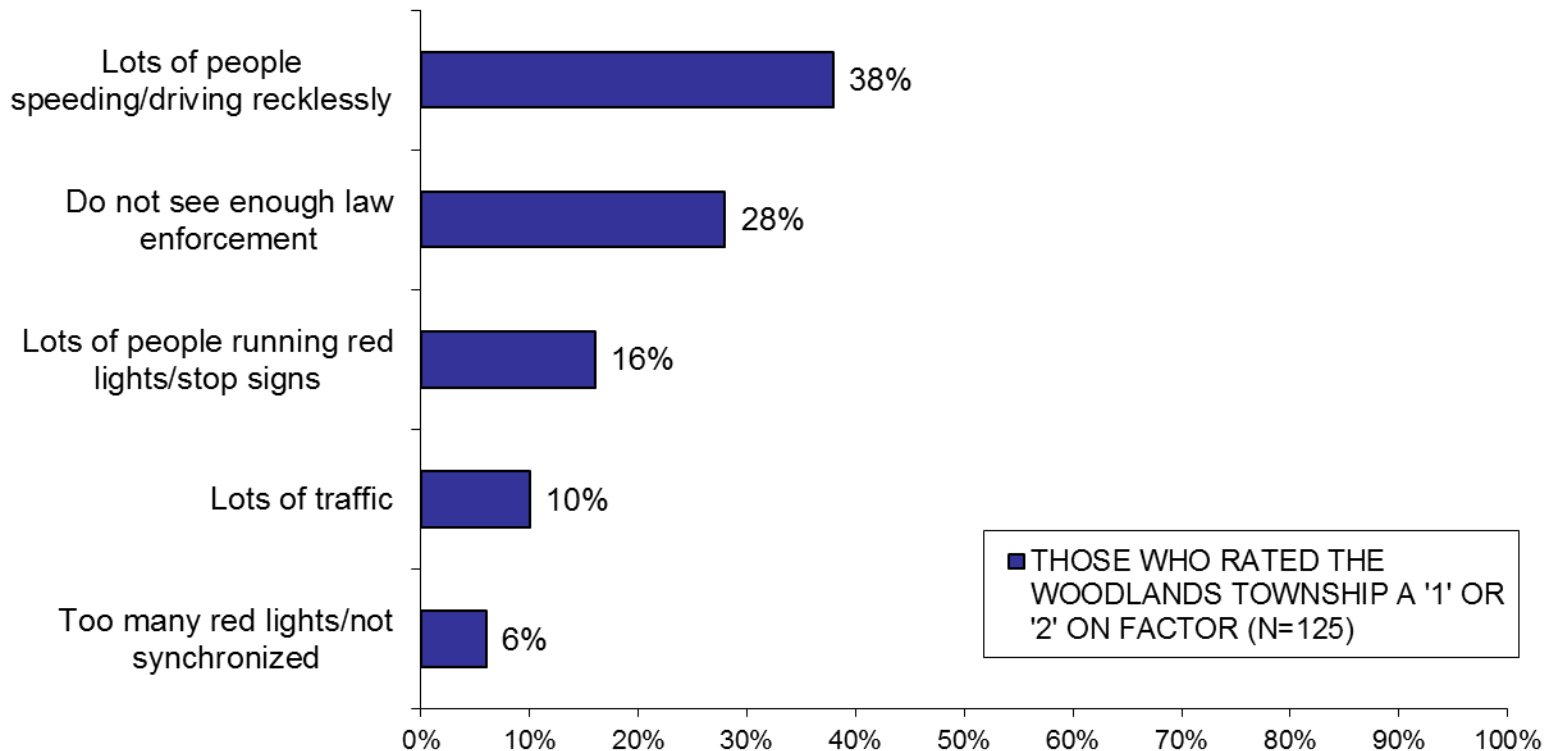


# Reasons Rated Law Enforcement as 'Poor'





# Reasons Rated Traffic Enforcement as 'Poor'



Q7. Closed-ended question

# Rating Services Provided by The Woodlands Township

## 91% Excellent/Very Good/Good

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Excellent	33%	35%	37% <b>P</b>	30%	26%	36%	36%	29%	38%
Very good	39%	38%	44%	37%	39%	38%	43%	35%	42%
Good	19%	17%	13%	19%	24% <b>C</b>	20%	17%	23%	17%
Fair	6%	6%	5%	10% <b>I</b>	8% <b>I</b>	5%	2%	9% <b>I</b>	2%
Poor	2%	3%	1%	3%	3%	2%	2%	2%	0%

# Rating Tax Rate Overall in Terms of Value for the Money

**59% Excellent/Very Good/Good**

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Excellent	7%	6%	5%	10%	7%	7%	7%	7%	10%
Very good	20%	19%	22%	17%	21%	24%H	27%H	13%	17%
Good	32%	30%	36%	31%	26%	34%	33%	31%	35%
Fair	30%	32%	30%	28%	36%I	26%	24%	35%	23%
Poor	8%	7%	4%	11%C	7%	8%	6%	7%	13%

Q9. Closed-ended rating question

## Law Enforcement/Safety

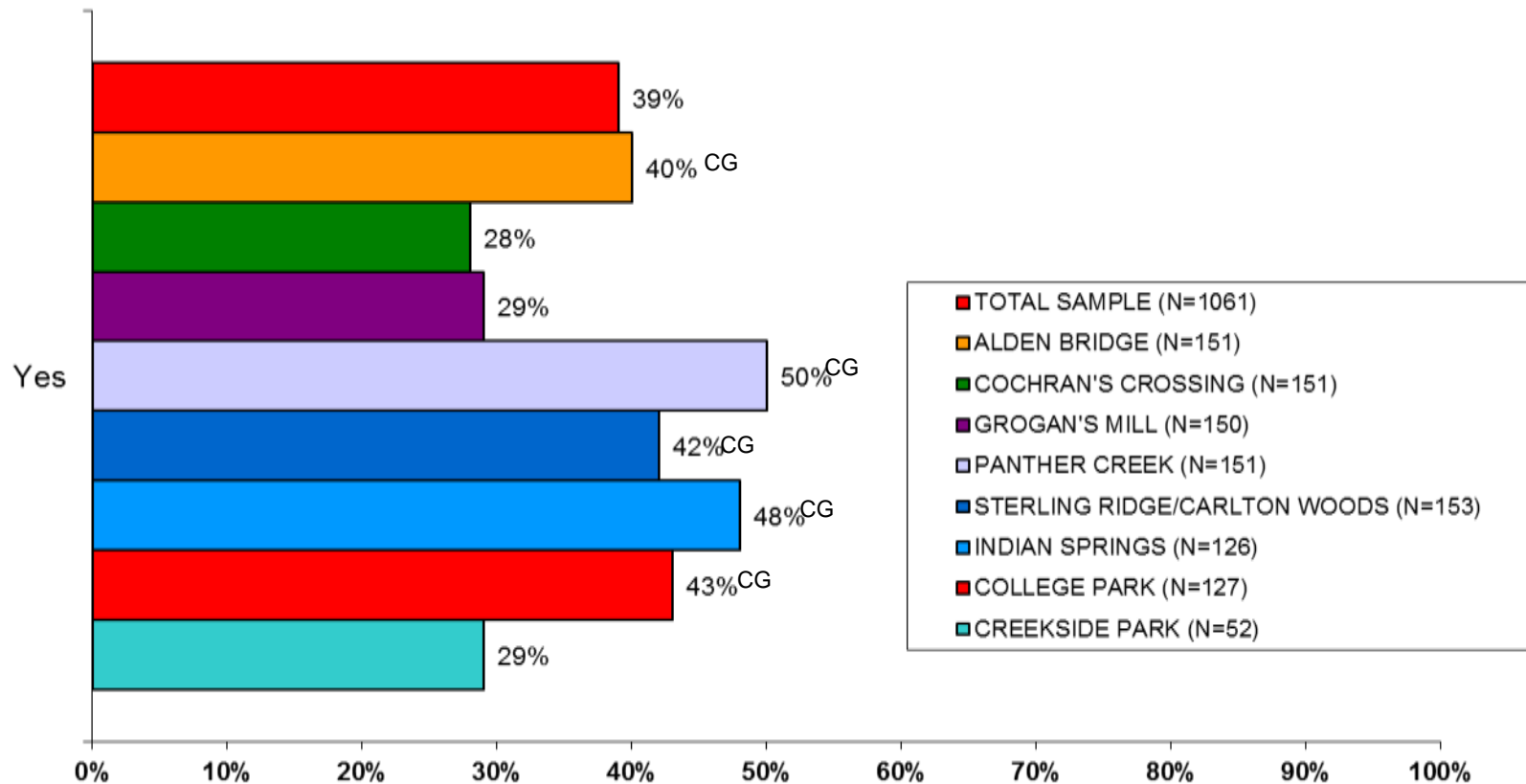
# Traffic Concerns

- 39% feel traffic enforcement has improved in the past year
  - 92% of residents feel it is somewhat to very important for The Township to continue paying for the additional enforcement

# Safety Issues

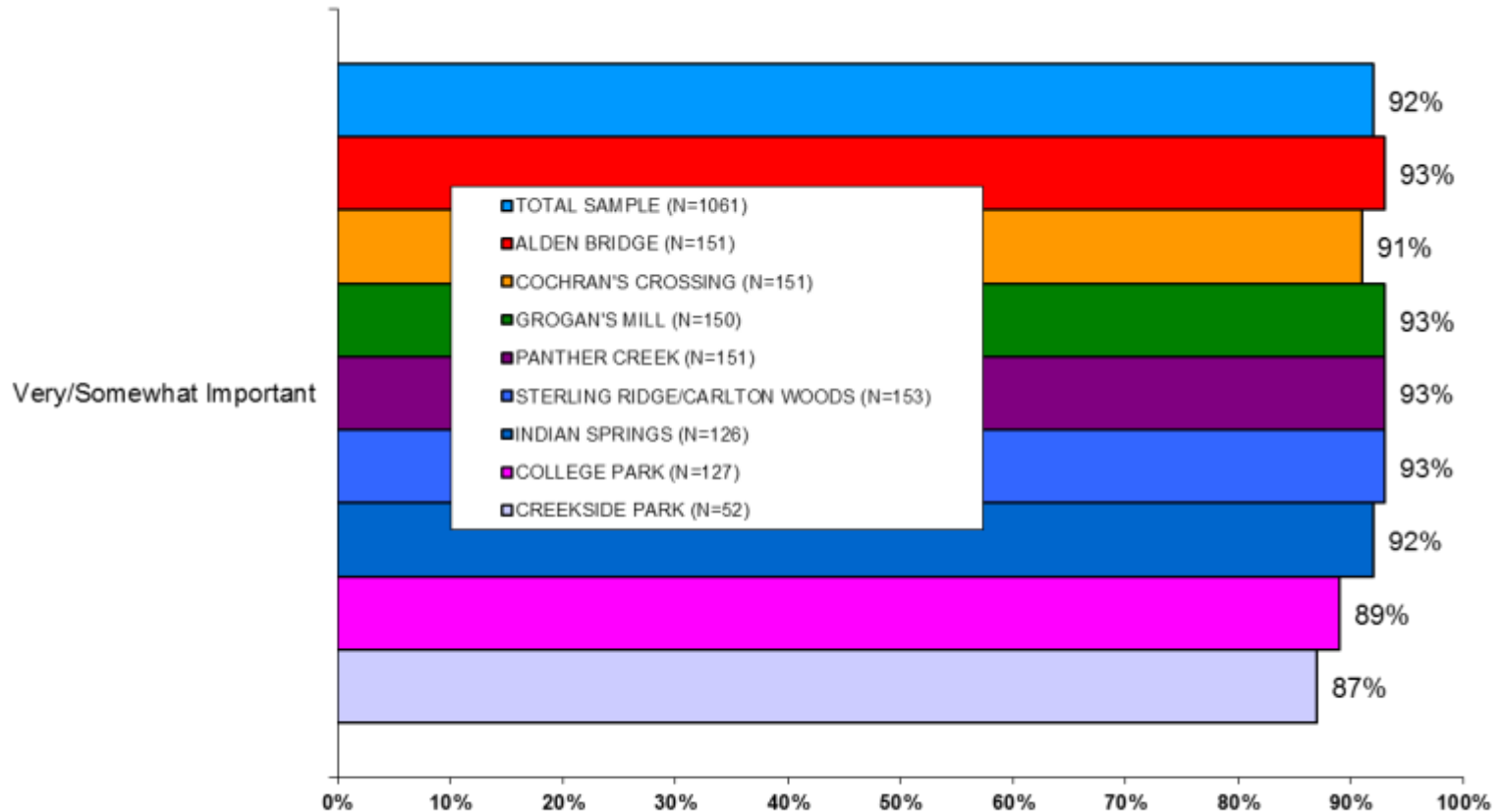
- The Woodlands Township residents feel less safe in some areas
  - They rate safety highest in their neighborhoods during the day and at Market Street, and lowest at the Woodlands Mall and on pathways
  - Safety along the Waterway was added this year and residents feel safe here (4.38)

# Has Law Enforcement Visibility Improved in Past Year?



Q10. Closed-ended

# Important to Continue Paying for Enhanced Law Enforcement



Q11. Closed-ended question



# Rating Safety Level

(1 = Do not feel safe at all; 5 = Feel very safe)

	In neighborhood during day	At Market Street	Along waterway	At Village shopping center	While driving on roads	In community parks	In neighborhood at night	At Woodlands Mall	On pathways
<b>Total Sample (N=1061)</b>	4.53	4.54	4.38	4.39	4.26	4.14	4.12	3.90	3.88
<b>Alden Bridge (N=151)</b>	4.56P	4.53	4.35	4.43H	4.33	4.22PI	4.12	3.85	3.89
<b>Cochran's Crossing (N=151)</b>	4.6PS	4.59	4.47	4.46H	4.30	4.16	4.20	3.95	3.93P
<b>Grogan's Mill (N=150)</b>	4.62PS	4.55	4.46	4.46H	4.29	4.17	4.09	4.08SAPI	3.85
<b>Panther Creek (N=151)</b>	4.35	4.50	4.27	4.30	4.19	4.01	4.03	3.79	3.69
<b>Sterling Ridge/Carlton Woods (N=153)</b>	4.44	4.52	4.37P	4.39H	4.29	4.13	4.07	3.78	3.97PI
<b>Indian Springs (N=126)</b>	4.53P	4.44	4.29	4.38	4.18	4.00	4.16	3.84	3.75I
<b>College Park (N=127)</b>	4.64PS	4.63I	4.48I	4.20	4.25	4.22PI	4.15	3.93	4.00P
<b>Creekside Park (N=52)</b>	4.56	4.56	4.28	4.55	4.25	4.28	4.18	4.08	4.10

Q12. Closed-ended rating question

## Covenants/Deed Restrictions

# Deed Restrictions

- Overall, residents are satisfied with the enforcement of deed restrictions
  - 95% feel deed restriction enforcement is somewhat to very important
  - 85% indicate that the enforcement of deed restrictions is very or somewhat effective
  - 65% feel that the level of deed restriction enforcement is “about right”
    - About two in ten state it is too strict

# Effectiveness of Enforcement of Deed Restrictions

## 85% Very/Somewhat Effective

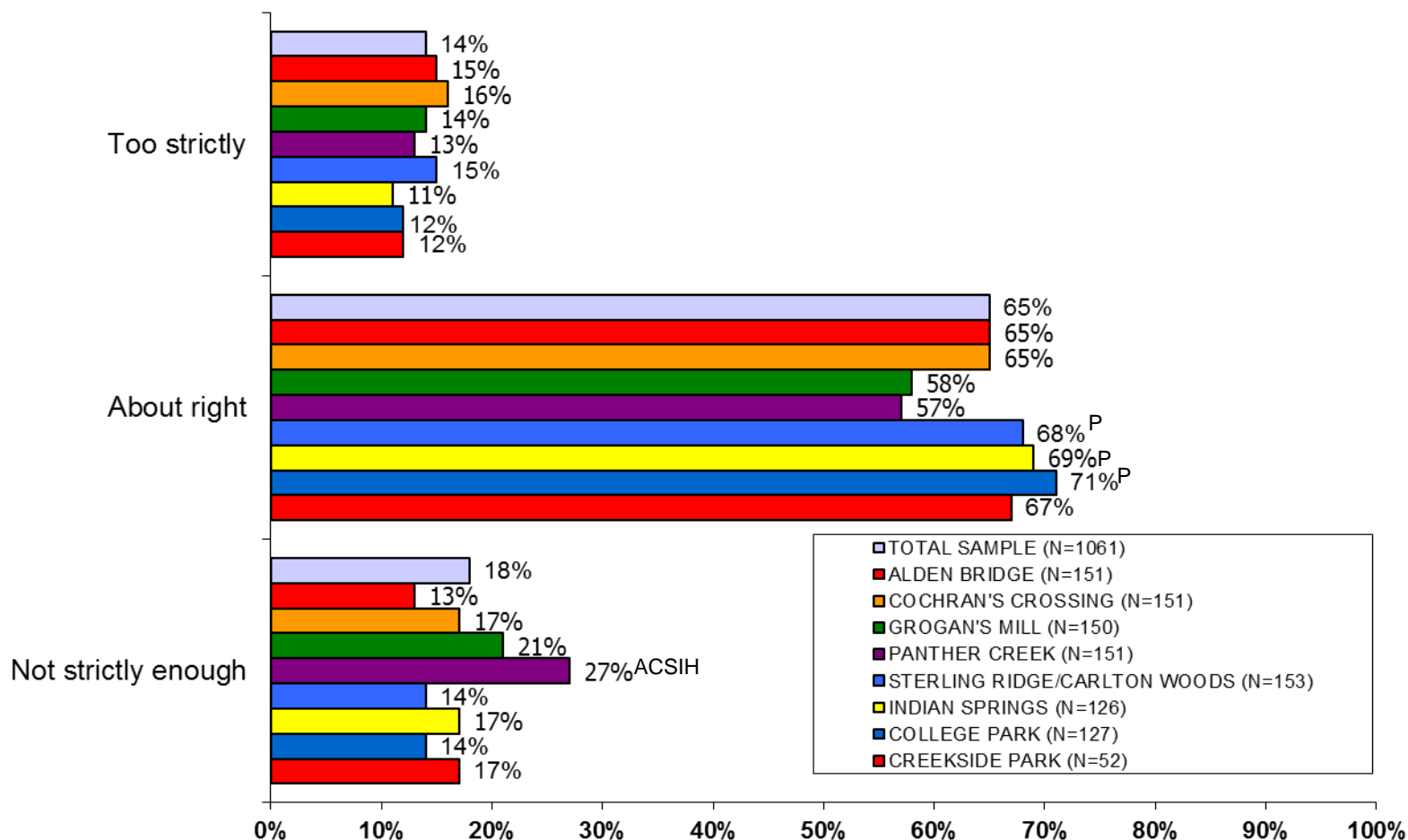
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Very effective	<b>47%</b>	49%	44%	47%	33%*	56%	52%	46%	56%
Somewhat effective	<b>38%</b>	36%	44% <sup>S</sup>	37%	47% <sup>ASI</sup>	32%	33%	41%	27%
Neither effective nor ineffective	<b>6%</b>	5%	7%	7%	9%	5%	6%	4%	6%
Not very effective	<b>5%</b>	5%	3%	4%	8% <sup>C</sup>	5%	5%	4%	8%
Not at all effective	<b>2%</b>	3%	1%	3%	2%	2%	2%	3%	2%

# Importance of Deed Restriction Enforcement

## 95% Very/Somewhat Important

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Very important	71%	71%	68%	68%	67%	74%	71%	71%	83%
Somewhat important	24%	22%	28%	25%	28%	22%	23%	21%	13%
Neither important nor unimportant	3%	3%	1%	5%	3%	2%	2%	5%	4%
Not very important	2%	3%	1%	1%	2%	2%	3%	2%	0%
Not at all important	0%	1%	1%	0%	0%	0%	0%	1%	0%

# Feel That Deed Restrictions Are Enforced...



Q15. Closed-ended

# Deed Restrictions

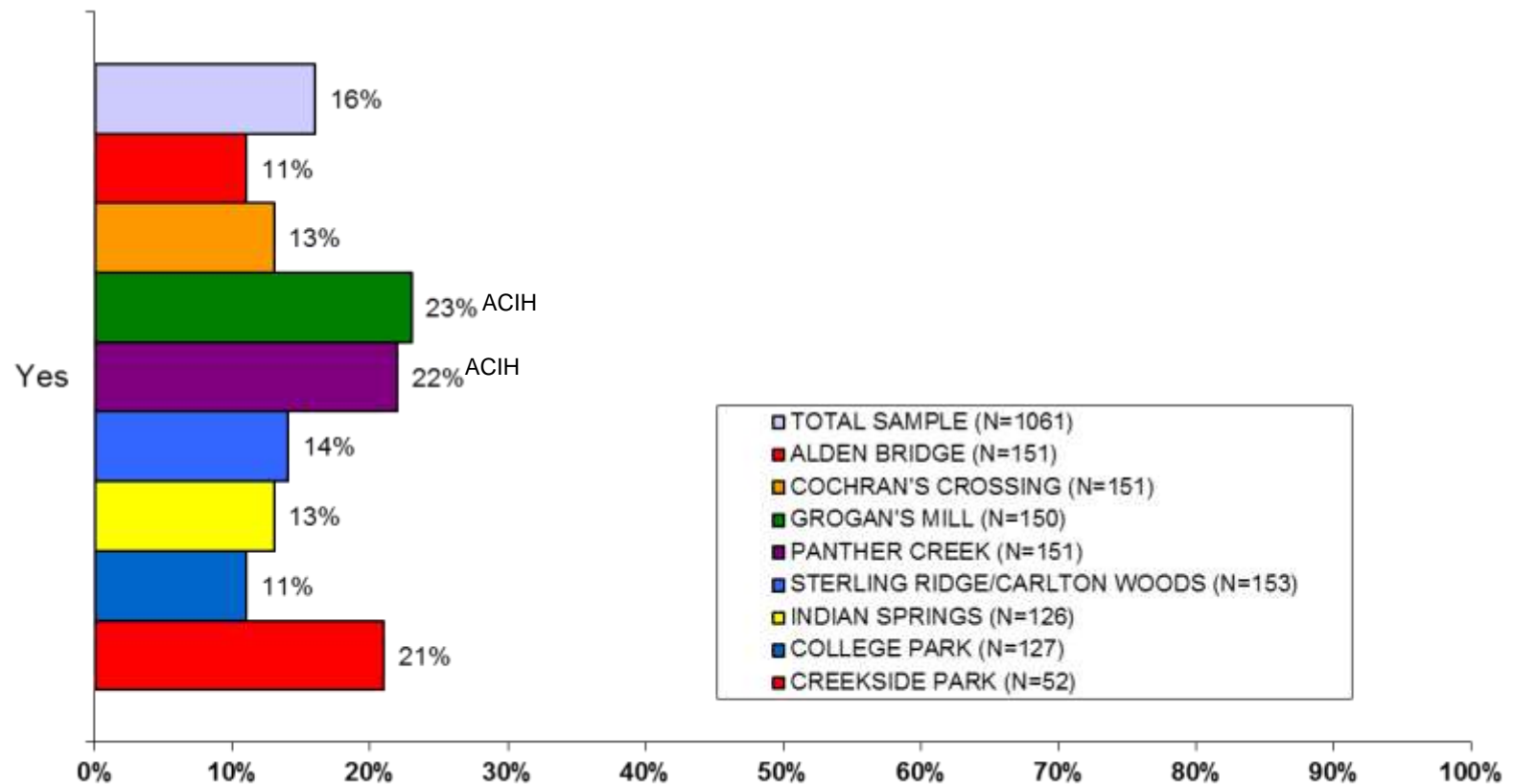
- Few (16% or 167 residents) have filed a complaint about deed restrictions
  - 42% of the 167 who filed a complaint are satisfied with the response to their filed complaint
  - However, 28% are not at all satisfied with how their complaint was handled
- 33% say they received a letter about a violation
  - 59% of these 351 who received a letter about a violation are satisfied with the response to or resolution of the situation

# Deed Restrictions

- 39% applied to make property improvements through the RDRC
  - Harper's Landing and Alden Bridge residents made the fewest applications compared to other areas
  - 78% of those who applied are somewhat/very satisfied with The Township's response to this application

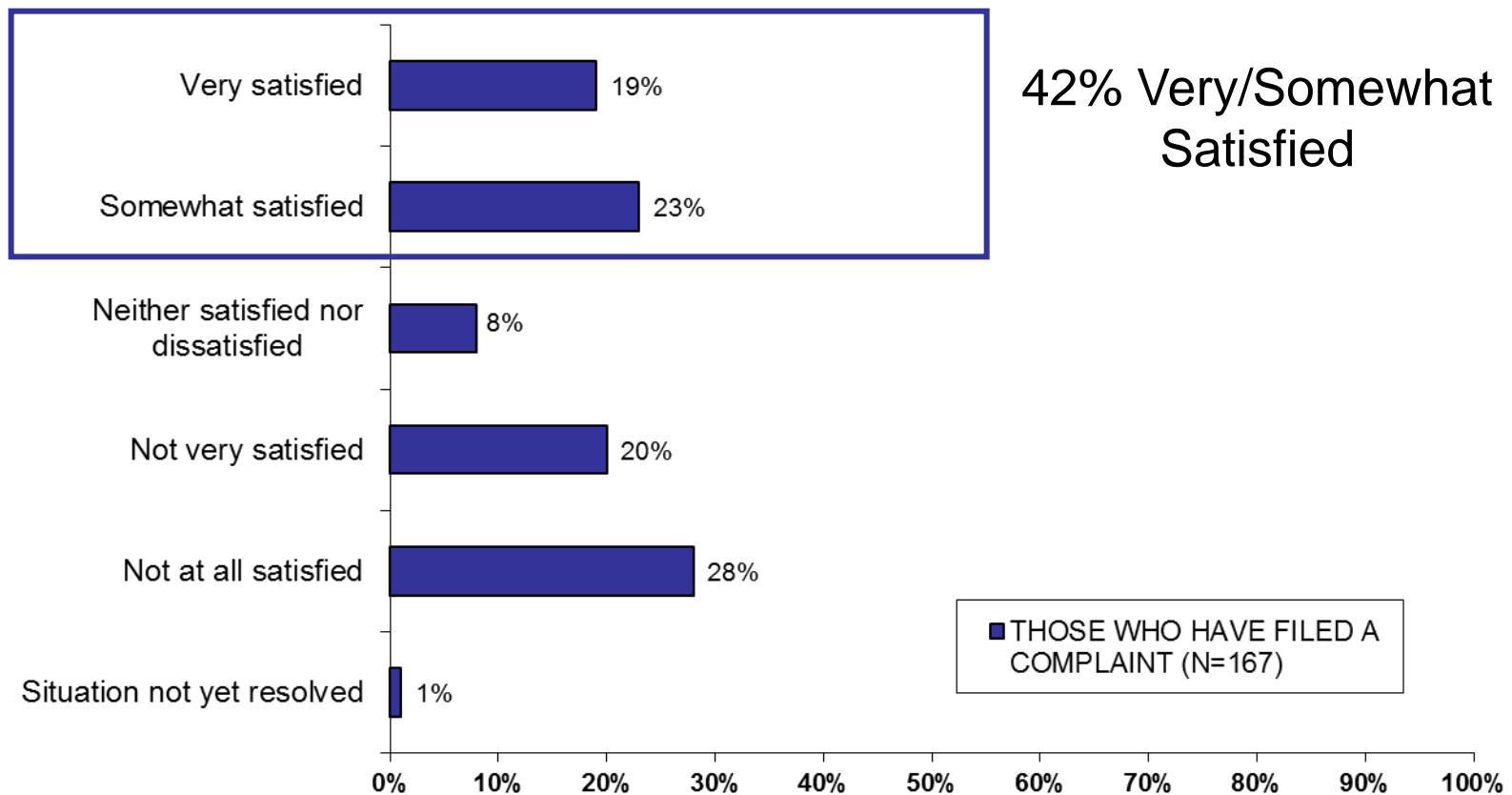


# Filed Complaint About Deed Restriction in Village



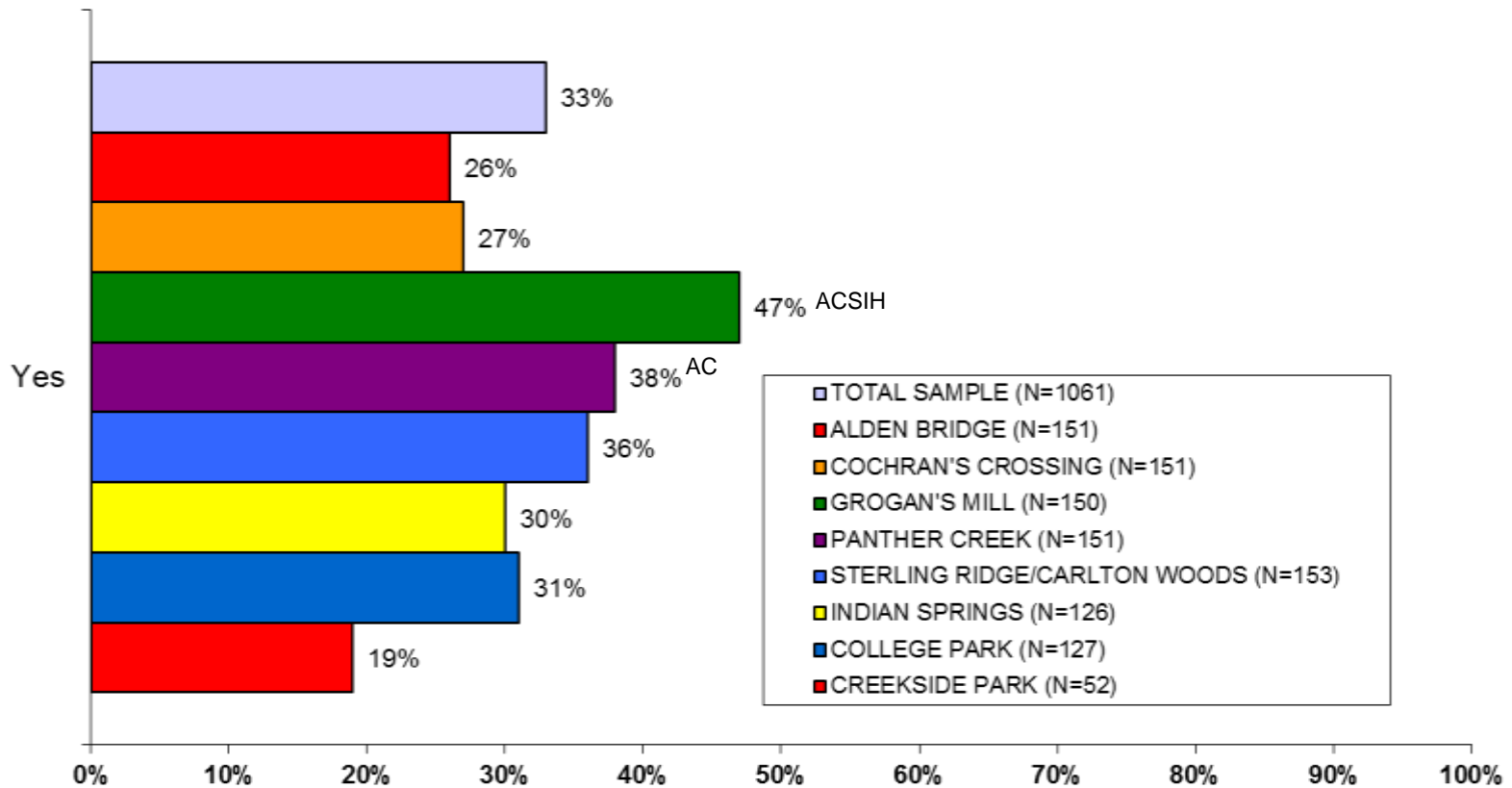
Q16. Closed-ended question

# Satisfaction with Response to Complaint Filed



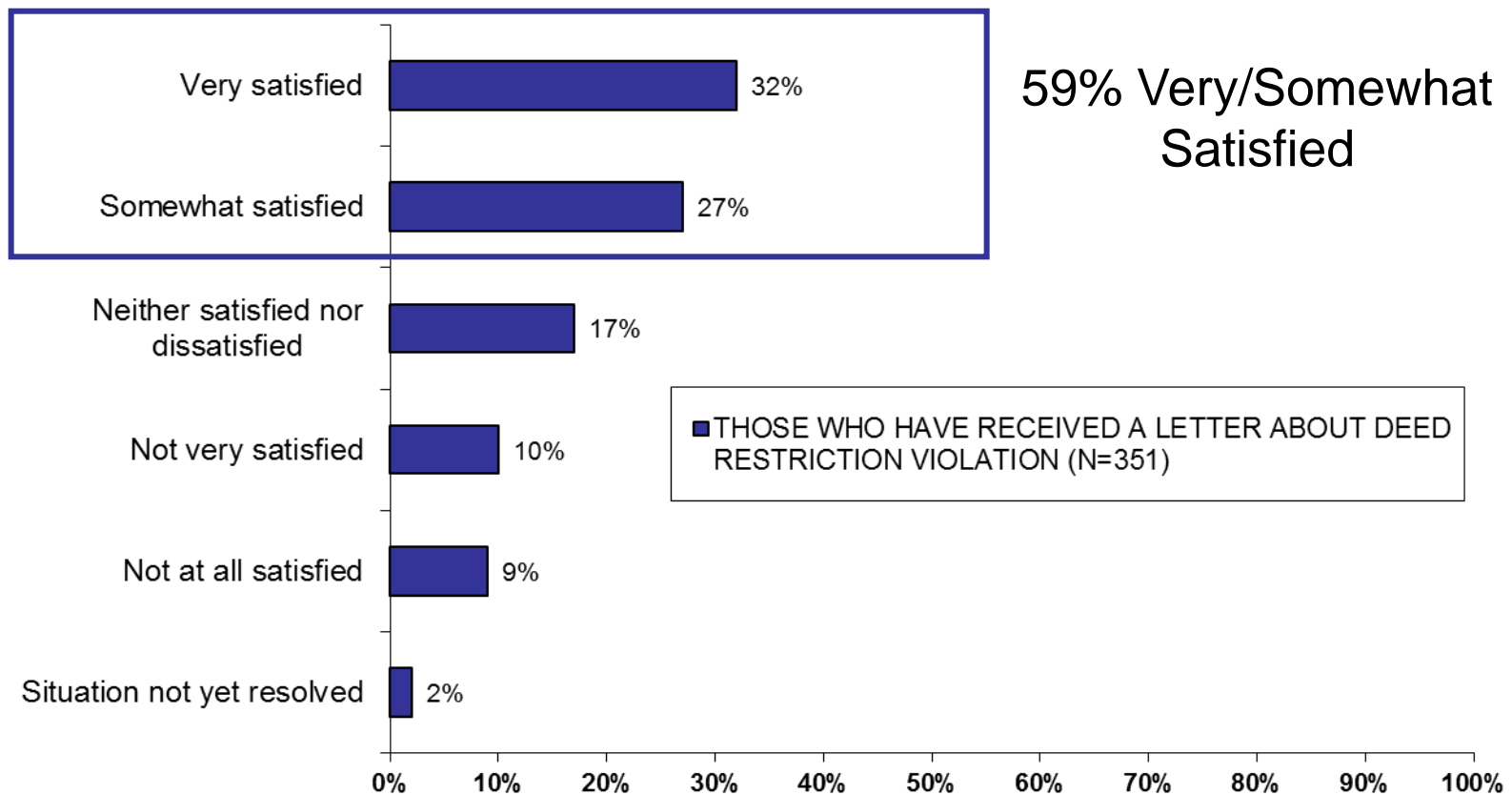
Q17. Closed-ended question

# Received Letter About Deed Restriction Violation on Property



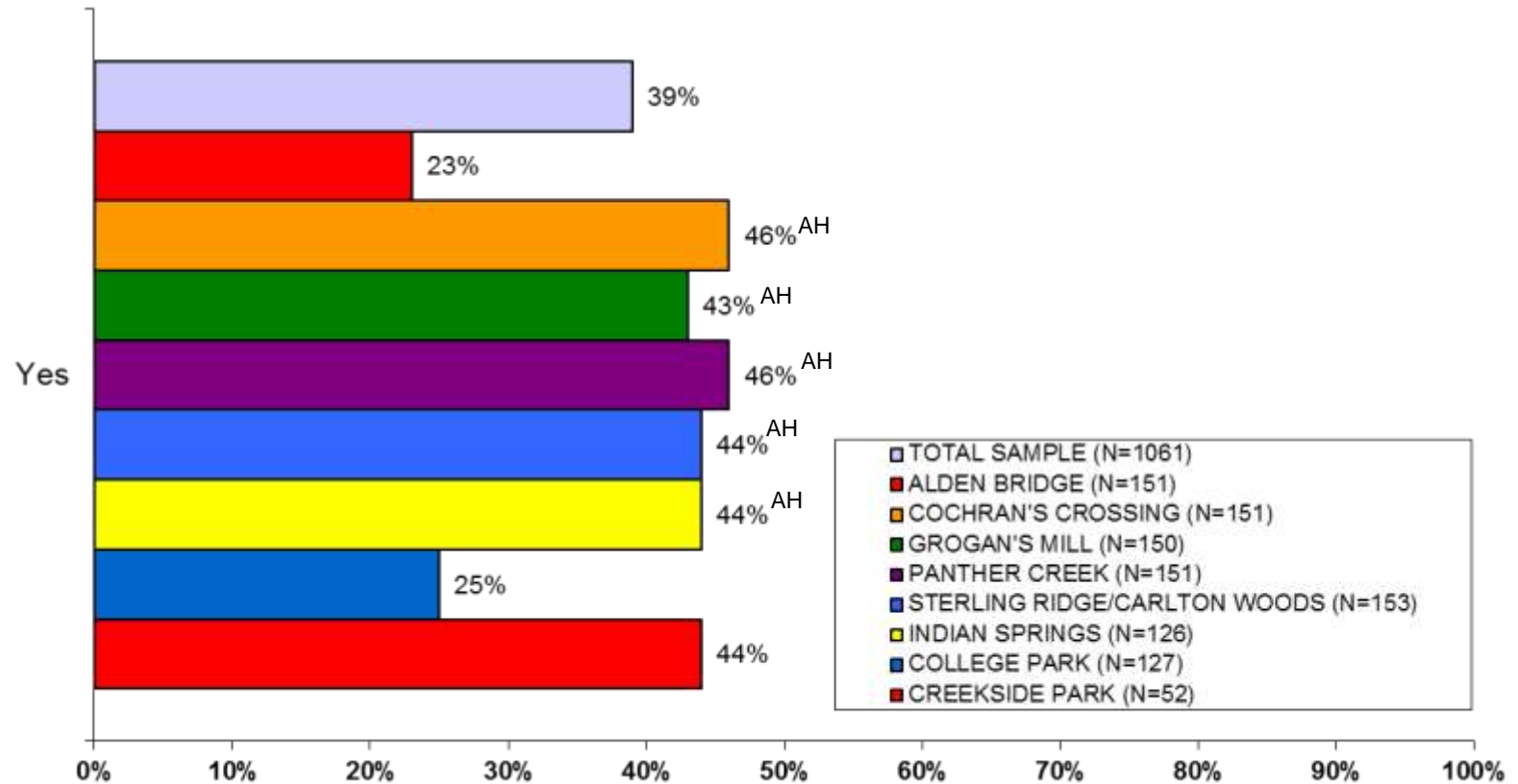
Q18. Closed-ended

# Satisfaction with Response to Resolution of Situation



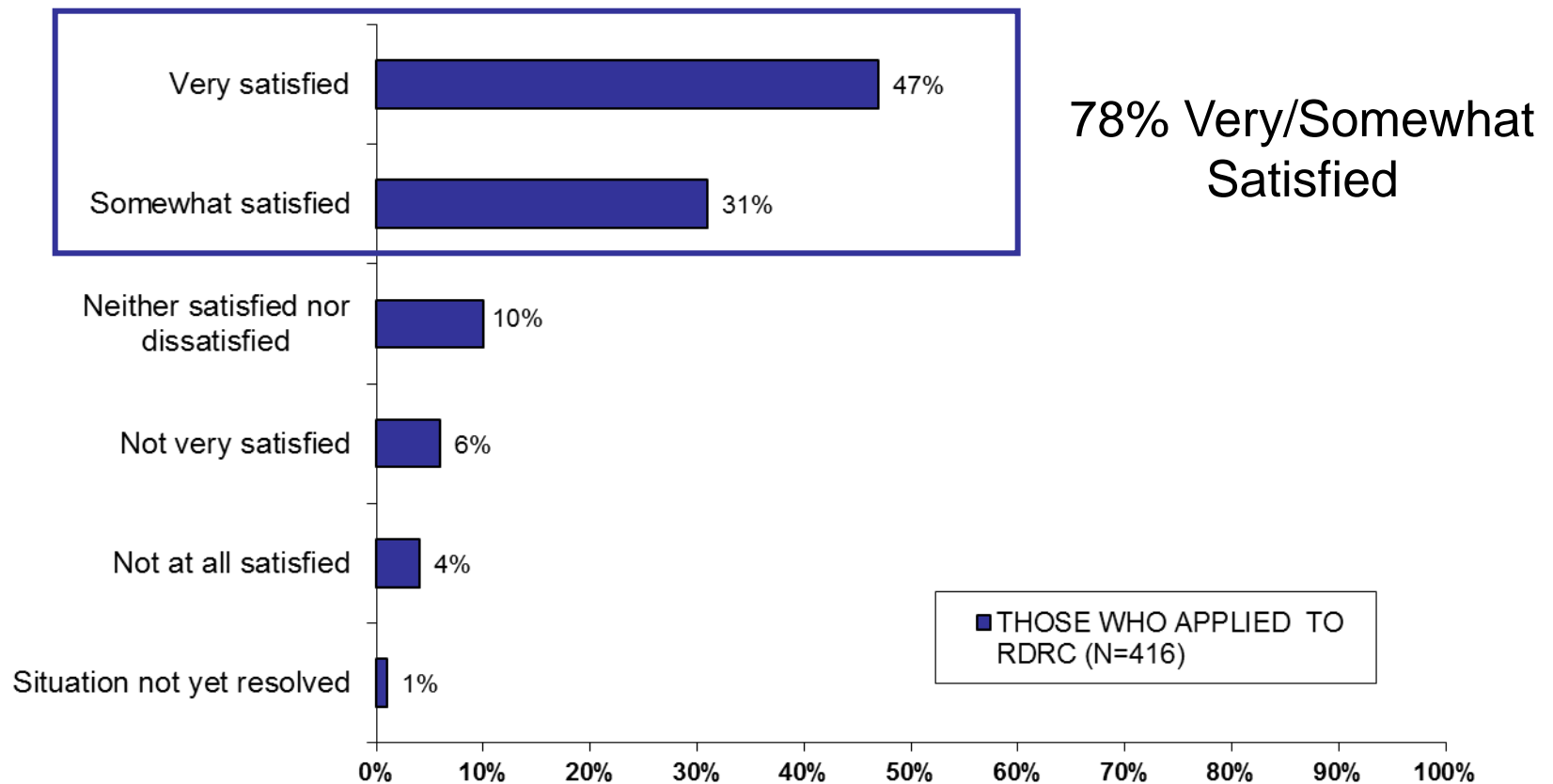
Q19. Closed-ended

# Applied for Property Improvement Through RDRC



Q20. Closed-ended question

# Satisfaction with Response to Application



Q21. Closed-ended question

# Communications

# Methods of Communication

- The Woodlands Township residents primarily rely on community-based print media to learn about community activities
  - 28% from The Villager
  - 25% from The Woodlands Community Magazine
  - 11% from The Township's website, E-neighbor, or Internet newsletter



# How Primarily Learn About Activities in Community

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
The Villager	28%	32%SH	35%SH	33%SH	34%SH	17%	32%SH	17%	6%
The Woodlands Community Magazine	25%	24%	26%	25%	25%	25%	21%	28%	21%
Neighbors/friends/word-of-mouth	10%	11%	10%	11%	7%	9%	13%H	6%	12%
Internet	7%	9%	5%	8%	5%	12%CP	6%	6%	4%
Email	8%	5%	6%	7%	5%	16%ACGPH	10%	6%	21%
Newspaper	5%	3%	7%	2%	4%	6%	9%	9%	2%
E-neighbor or Internet newsletter	2%	3%	3%	2%	2%	3%	0%	3%I	6%
Township website	2%	2%	3%G	0%	3%G	4%G	1%	2%	10%

# The Woodlands Community Magazine

- 94% recall receiving The Woodlands Community Magazine. Of those who reported receiving or using it for community information:
  - 54% read all or most of the contents
  - 82% indicate that the magazine is an effective information source

# The Woodlands Community Magazine

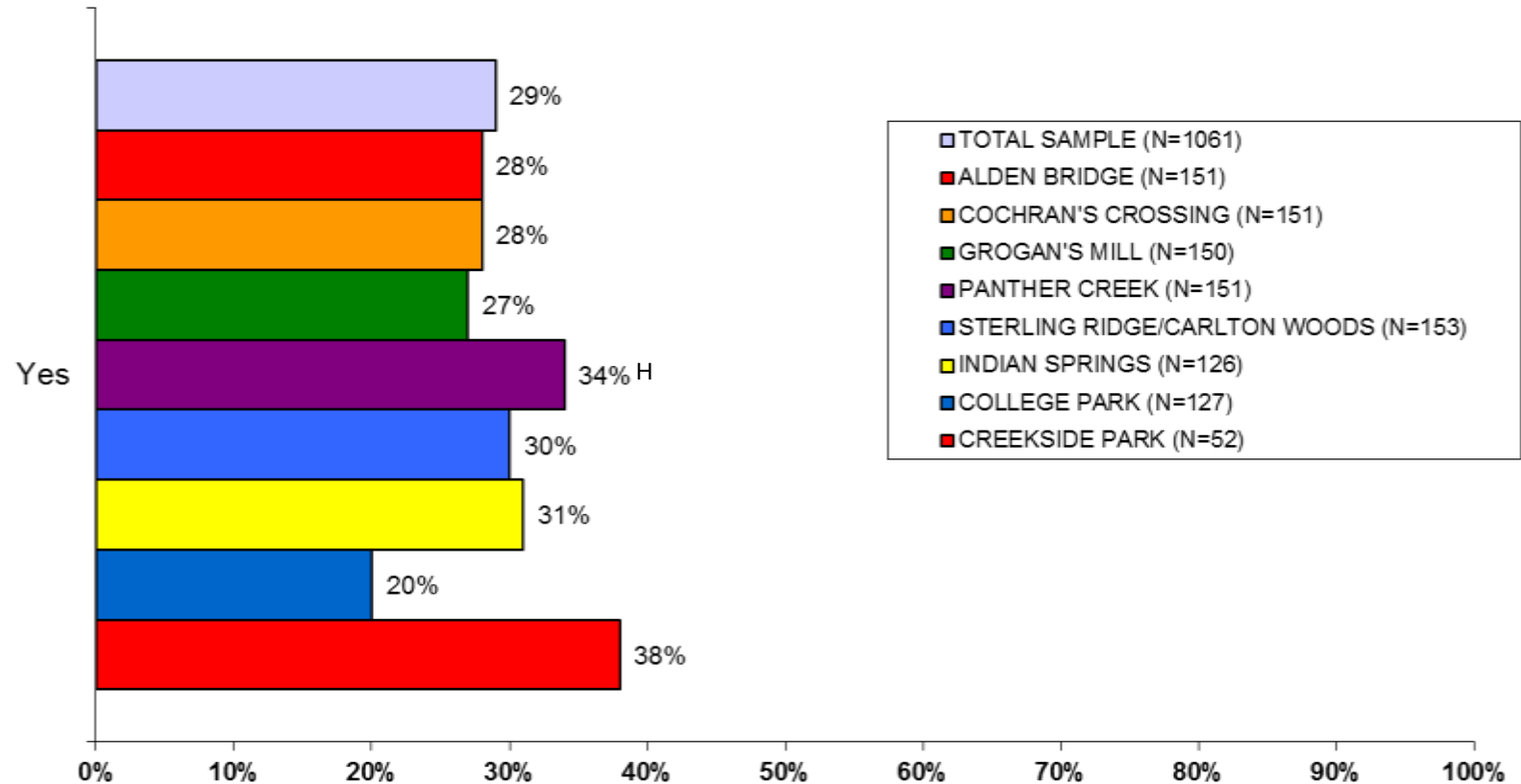
Base: Those who do not hear about community information through magazine	Total Sample (N=800)	Alden Bridge (N=115)	Cochran's Crossing (N=112)	Grogan's Mill (N=112)	Panther Creek (N=113)	Sterling Ridge/ Carlton Woods (N=114)	Indian Springs (N=100)	College Park (N=93)	Creekside Park (N=41)
<b>Receives/Uses The Woodlands Community Magazine</b>	<b>94%</b>	<b>96%</b>	<b>95%</b>	<b>90%</b>	<b>96%</b>	<b>96%</b>	<b>94%</b>	<b>94%</b>	<b>85%</b>
Base: Those who report receiving the magazine or hearing about community information through it	Total Sample (N=1012)	Alden Bridge (N=146)	Cochran's Crossing (N=145)	Grogan's Mill (N=139)	Panther Creek (N=146)	Sterling Ridge/ Carlton Woods (N=149)	Indian Springs (N=120)	College Park (N=121)	Creekside Park (N=46)
<b>Typically Reads...</b>									
All of magazine	25%	27%C	16%	25%	22%	30%C	21%	24%	41%
Most of magazine	29%	24%	31%	26%	35%AS	23%	32%	33%	30%
Some of magazine	38%	37%	46%	40%	34%	42%	39%	34%	24%
None of magazine	8%	12%	8%	8%	8%	5%	8%	8%	4%
<b>Magazine Effectiveness</b>									
Very effective	40%	42%	36%	40%	38%	44%	35%	48%CI	43%
Somewhat effective	42%	36%	49%A	43%	41%	42%	43%	37%	43%
Neither effective nor ineffective	6%	5%	5%	9%	8%	6%	7%	5%	7%
Not very effective	5%	8%	4%	1%	6%G	4%	7%	4%	2%
Not at all effective	4%	5%	3%	4%	4%	3%	4%	4%	4%

## Communication with Staff

# Township Staff

- The Township Staff provides residents quality service
  - In the past 2 years, 29% contacted a Staff Member. The Staff rates well on all aspects on a 5-point scale with a 5 being 'Excellent,' especially for courtesy and professionalism:
    - Courtesy: 4.12
    - Professionalism: 4.04
    - Helpfulness: 3.86
    - Timeliness of response: 3.74
  - The Deed Restrictions/Residential Design Review Committee and Parks/Recreation departments are the most contacted
  - Most contact the Staff member by telephone or in person but many also email the Staff

# In Past 2 Years, Have Had Personal Communication with Member of Township's Staff



Q26. Closed-ended question

# Departments Contacted

Base: Those who had communicated with a member of the staff	Total Sample (N=309)	Alden Bridge (N=43)	Cochran's Crossing (N=43)	Grogan's Mill (N=41)	Panther Creek (N=51)	Sterling Ridge/ Carlton Woods (N=46)	Indian Springs (N=39)	College Park (N=127)	Creekside Park (N=52)
Deed Restrictions/Residential Design Review/RDRC Committee	29%	16%	18%	41%	33%	40%	25%	19%	35%
Parks/Recreation	20%	23%	26%	17%	24%	22%	18%	15%	10%
Administration	3%	2%	2%	5%	6%	2%	0%	0%	0%
Parks/Maintenance	4%	2%	7%	2%	2%	4%	5%	0%	5%
Neighborhood Services	5%	7%	5%	0%	4%	4%	8%	12%	5%
Don't know/don't remember	16%	21%	12%	17%	16%	13%	15%	23%	10%

*Note: low base sizes, no significance testing performed*

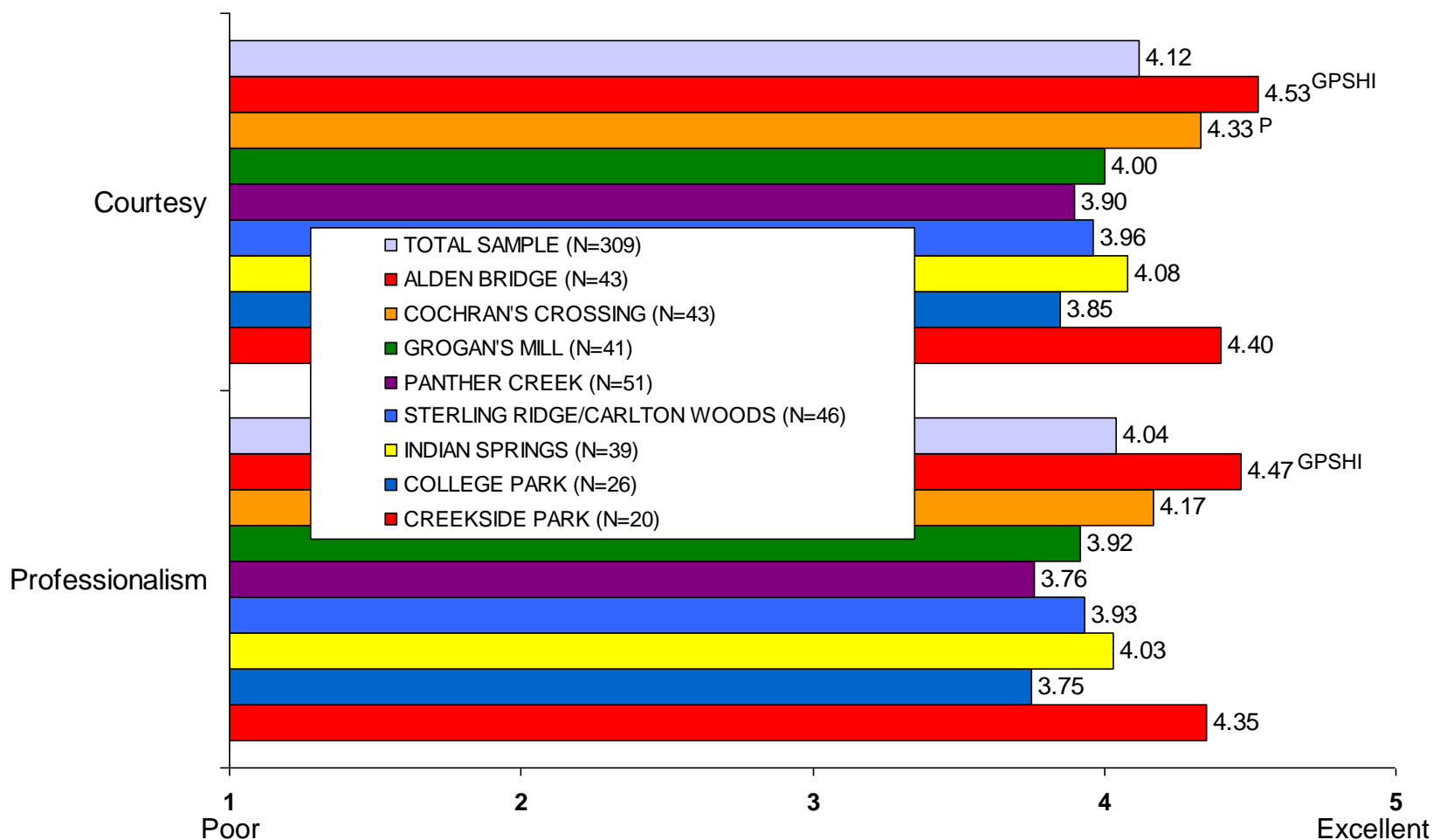
# How Communicated

Base: Those who had communicated with a member of the staff	Total Sample (N=309)	Alden Bridge (N=43)	Cochran's Crossing (N=43)	Grogan's Mill (N=41)	Panther Creek (N=51)	Sterling Ridge/ Carlton Woods (N=46)	Indian Springs (N=39)	College Park (N=20)	Creekside Park (N=20)
By phone	61%	65%	70%	56%	59%	67%	59%	50%	60%
In person	50%	49%	42%	46%	55%	39%	51%	69%	55%
Via e-mail	30%	23%	33%	22%	33%	37%	28%	27%	45%
On the website	11%	0%	9%	10%	8%	28%	13%	12%	10%
Don't remember/refused	1%	2%	0%	0%	0%	0%	3%	0%	0%

*Note: low base sizes, no significance testing performed*



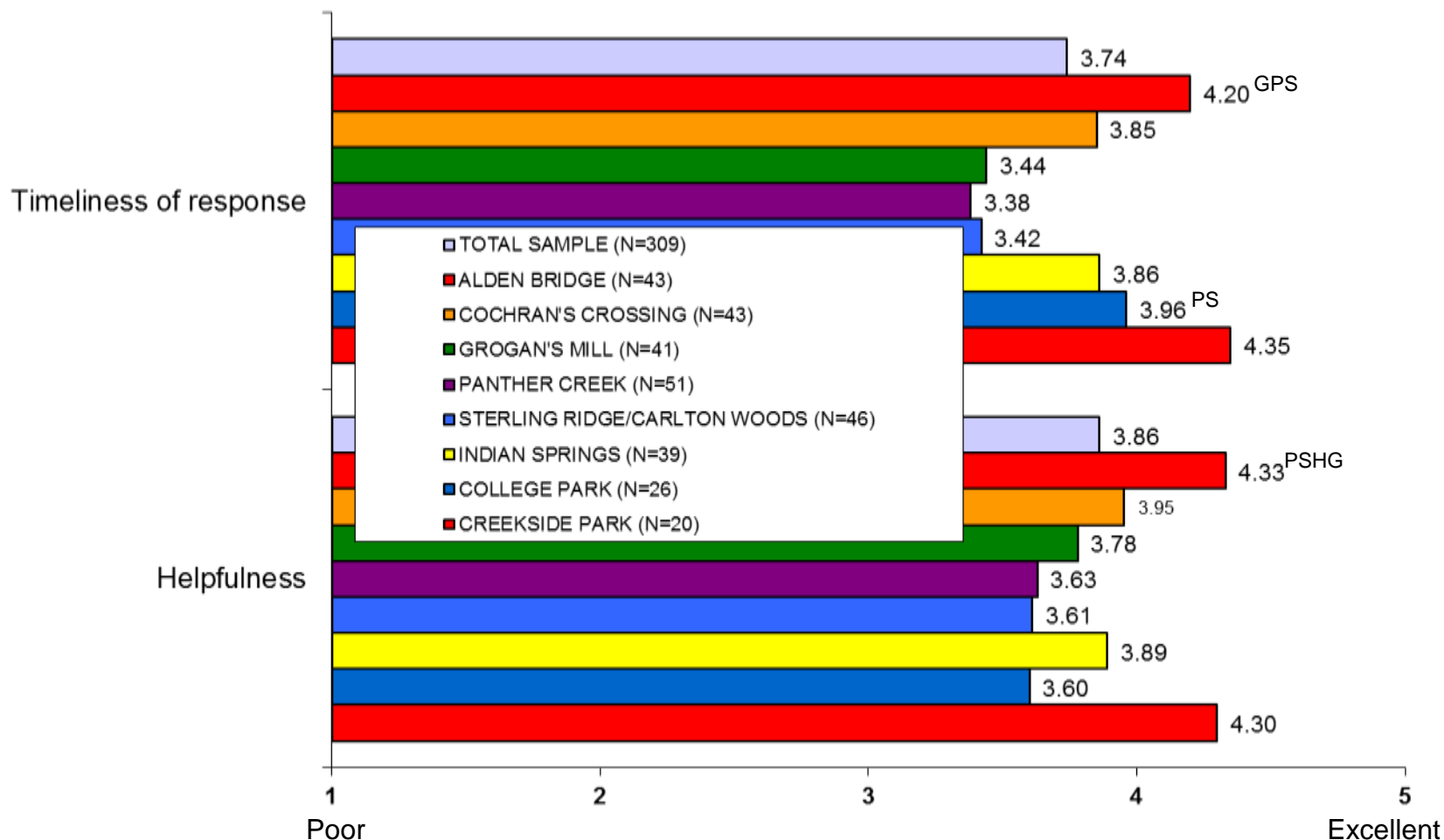
# Rating Staff Based on Communication (1 = Poor; 5 = Excellent)



Q29. Closed-ended rating question

# Rating Staff Based on Communication

(1 = Poor; 5 = Excellent)



# Local Governance

# Involvement

- Residents look to The Township to provide safety and security
- About half (49%) are satisfied with the current level of input and influence they have in the local government
  - About one-third (30%) are neither satisfied nor dissatisfied with the amount of input they have with their new government

# Most Important for The Township to Provide

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Safety	41%	44%H	43%	34%	38%	52%GPH	44%	32%	44%
Security	18%	17%	18%	17%	15%	25%PH	23%H	11%	17%
Emergency and fire services	9%	8%	9%	9%	11%	7%	6%	13%	10%
Clean environment/neighborhood	9%	7%	10%	11%	7%	10%	9%	10%	13%
Waste management and garbage pick-up	8%	10%	11%	7%	6%	7%	10%	7%	12%
Maintaining parks and recreation	8%	12%	7%	10%	5%	8%	7%	6%	12%
Traffic control/flow	8%	7%	12%H	7%	10%	9%	13%H	5%	0%
Deed restriction enforcement	7%	5%	5%	12%ACP	4%	7%	6%	6%	4%
Maintain value of homes/property	7%	10%	3%	7%	5%	6%	9%	8%	6%
Maintain appearance of homes and businesses	6%	8%	3%	7%	7%	6%	6%	3%	6%

# Satisfaction with Amount of Influence in Local Decision Making

**49% Very/Somewhat Satisfied**

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Very satisfied	17%	16%	17%	15%	14%	18%	14%	22%	21%
Somewhat satisfied	32%	28%	31%	37%	38%	30%	36%	28%	25%
Neither satisfied nor dissatisfied	30%	36%	26%	30%	28%	29%	28%	30%	35%
Not very satisfied	7%	7%	7%	5%	9%	8%	10%	6%	6%
Not at all satisfied	4%	2%	7%A	5%	5%	6%	4%	2%	2%

# Development

- The Woodlands Township residents welcome economic development
  - A majority (84%) state continued economic development is important
  - 82% agree that new corporations in The Township are great for the area's economy and create more benefits than burdens for The Township

# Importance of Continued Economic Development

## 84% Very/Somewhat Important

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Very important	54%	53%	54%	55%	48%	64%PI	44%	54%	65%
Somewhat important	30%	32%	27%	29%	32%	26%	34%	31%	21%
Neither important nor unimportant	6%	5%	5%	7%	7%	3%	6%	6%	8%
Not very important	6%	3%	8%A	6%	7%	3%	11%AS	6%	4%
Not at all important	4%	6%	4%	3%	5%	3%	4%	3%	0%



# Opinion of New Corporations in The Woodlands

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Great for the economy	49%	49%	46%	49%	48%	54%	46%	43%	62%
Creates more burdens than benefits	13%	11%	13%	13%	15%	11%	13%	17%	6%
Creates more benefits than burdens	33%	32%	38%	35%	28%	32%	34%	31%	31%
No opinion/don't know	6%	8%G	3%	3%	9%CGS	3%	6%	9%CGS	2%

# Entertainment

- A majority (89%) rate the variety of entertainment in The Woodlands as good to excellent
  - Although most did not mention a desired store or entertainment venue, adding a Whole Foods is the top suggestion

# Rate Variety of Entertainment

**68% Very good/Excellent**

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Excellent	32%	33%	33%	41%PI	26%	33%	27%	31%	23%
Very good	36%	38%	35%	31%	43%GS	31%	37%	35%	46%
Good	21%	17%	21%	15%	19%	26%G	24%	24%	17%
Fair	8%	9%	9%	9%	7%	8%	8%	7%	10%
Poor	1%	0%	2%	1%	1%	1%	2%	0%	0%

# Other Entertainment Venues Would Like in The Woodlands

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Don't know	55%	66%CGSIH	55%	49%	60%	52%	52%	48%	52%
Theater	13%	9%	13%	13%	14%	12%	21%AH	11%	13%
Sports complex/arena/stadium	4%	5%	5%	5%	2%	7%P	2%	4%	2%
Museum	3%	0%	2%	2%	2%	7%ACGPI	1%	2%	8%
Band venues/live music	3%	3%	3%	4%	3%	3%	2%	1%	0%
Concerts	3%	1%	3%	1%	4%	4%	2%	5%A	4%

## Other mentions:

- Orchestra/Opera House
- Ice Skating Rink/Roller-skating
- Amusement/Water Park
- Cultural Center

# The Community

# Aspects Residents Like about The Woodlands Township

- The Woodlands Township residents name the environment/aesthetics as the most beloved aspect of living in The Woodlands
  - This includes greenery, plants, trees, and overall beauty of the area
    - Being conveniently located, safe, and having parks are also well liked aspects of The Township

# General Areas of Concern

- The top area for improvement is traffic control
  - Although there is no real consensus as to the most important issue facing residents, “don’t know,” taxes, traffic congestion, and law enforcement/crime are the top mentions

# Aspects Liked about Living in The Woodlands

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Appearance/beauty of area/trees/greenery	36%	32%	42% <b>H</b>	40% <b>H</b>	34%	33%	40% <b>H</b>	27%	44%
Conveniently located to everything	22%	26% <b>CS</b>	17%	20%	24% <b>S</b>	15%	23%	32% <b>CGS</b>	17%
Safe	20%	18%	19%	15%	13%	34% <b>*</b>	19%	22%	17%
Parks/woods/parkways/open spaces	17%	17%	19%	18%	17%	14%	17%	13%	31%
Nice/friendly neighbors/people	14%	14%	16% <b>P</b>	13%	8%	14%	15%	17%	13%
Family atmosphere	13%	15%	13%	11%	11%	20% <b>IH</b>	10%	8%	15%
Appearance/aesthetics/neat/clean	14%	20% <b>CGPS</b>	11%	11%	9%	12%	13%	20%	13%
Quiet/peaceful	10%	9%	11%	10%	7%	10%	6%	14% <b>I</b>	12%
Quality of life/lifestyle	10%	11%	7%	12%	11%	10%	10%	6%	15%
Has everything you need	10%	11%	10%	10%	13%	11%	10%	9%	8%
Schools/quality of education	9%	8%	8%	7%	7%	16% <b>ACGPI</b>	8%	10%	6%
Shopping/restaurants/entertainment	9%	13% <b>CS</b>	4%	9%	12% <b>C</b>	7%	10%	10% <b>C</b>	13%



# What Would Add/Remove to Improve The Woodlands

	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Don't know	38%	46%PS	42%	39%	33%	34%	37%	39%	38%
Traffic control	15%	14%	18%	13%	18%	16%	15%	18%	4%
Better law enforcement/lower crime	5%	3%	2%	5%	6%	7%C	2%	4%	10%
Slow construction/commercial businesses	4%	5%H	5%H	2%	7%GH	5%H	5%	1%	4%
Stop cutting down trees	4%	3%	7%GS	1%	7%GS	2%	5%	5%	6%
Slow overpopulation/too crowded	4%	6%P	6%P	7%P	1%	3%	5%P	3%	4%

# Most Important Issues Facing The Woodlands Residents

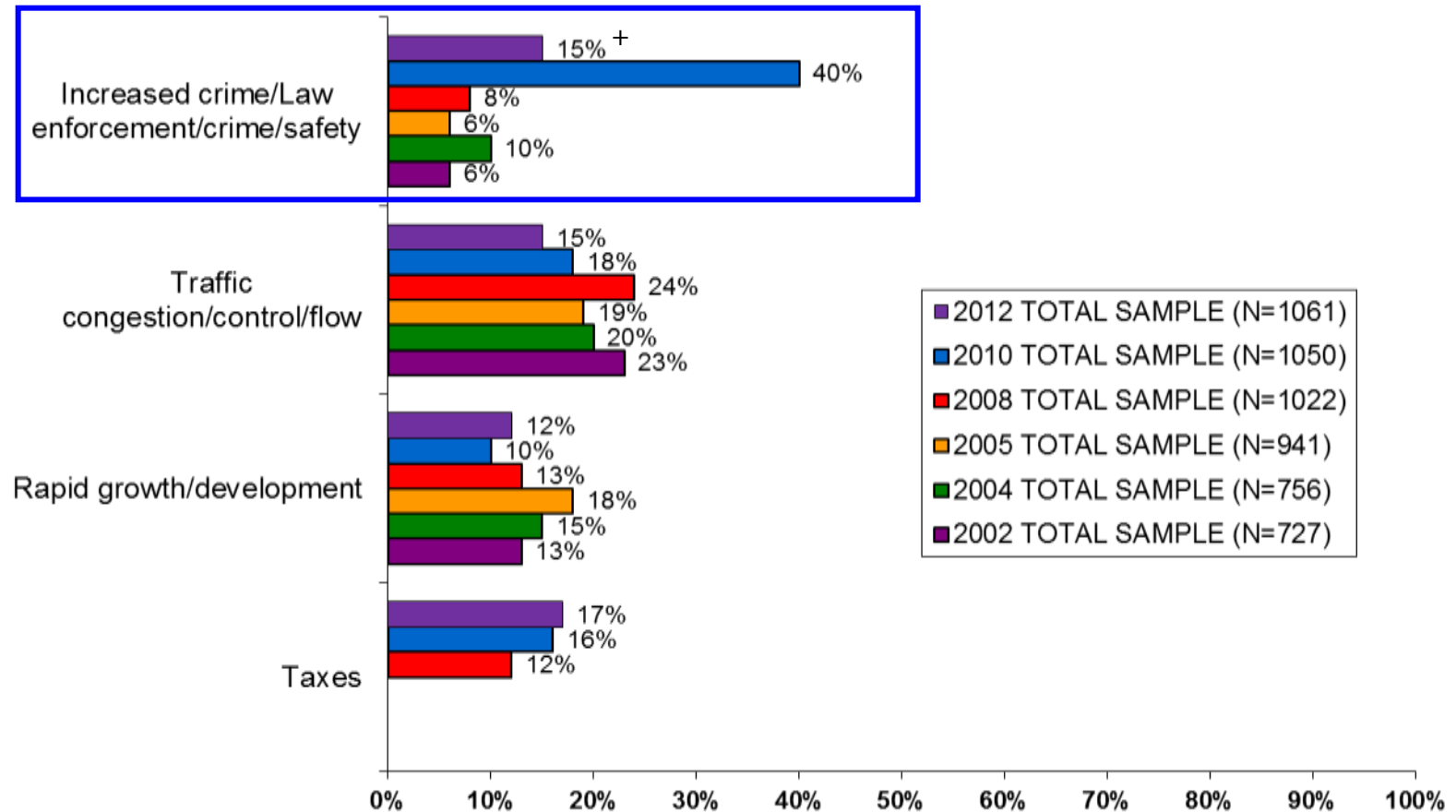
	Total Sample (N=1061)	Alden Bridge (N=151)	Cochran's Crossing (N=151)	Grogan's Mill (N=150)	Panther Creek (N=151)	Sterling Ridge/ Carlton Woods (N=153)	Indian Springs (N=126)	College Park (N=127)	Creekside Park (N=52)
Don't know	17%	22%	13%	21%	15%	12%	12%	24%	13%
Taxes	17%	13%	18%	18%	20%	16%	13%	20% <sup>1</sup>	23%
Law enforcement/crime/safety	15%	13%	14%	15%	15%	18%	17%	14%	12%
Traffic control/flow/congestion	15%	15%	14%	11%	20%	16%	19%	15%	12%
New construction/growth/over-development	12%	11%	17% <sup>1</sup>	8%	16%	14%	9%	8%	12%

## **Research Findings - Comparison to Previous Surveys**

# Changes Since Previous Years

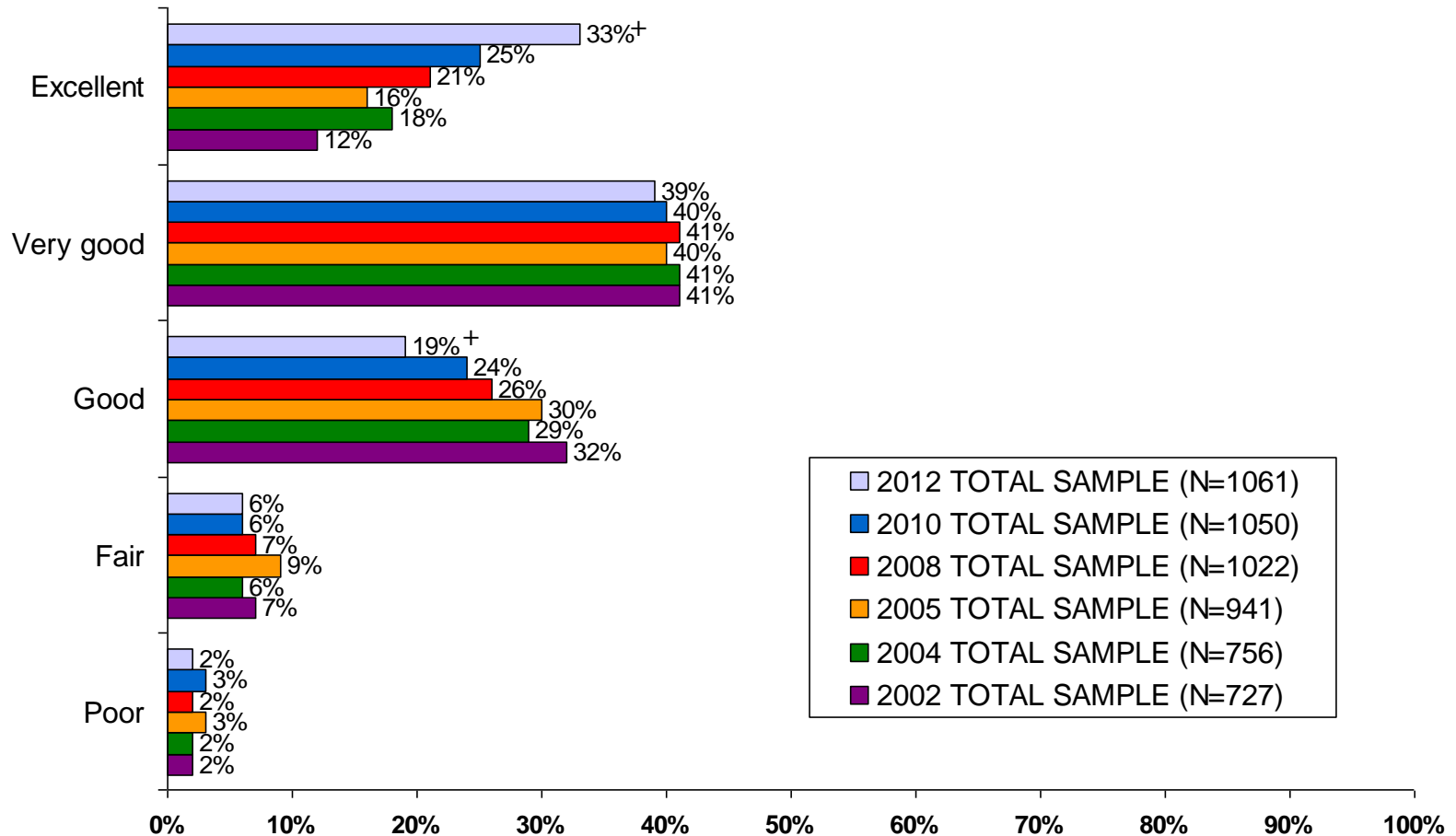
- **Most Important Issues**
  - Increased crime/law enforcement, safety concerns fell to pre-2010 levels; (15%) in 2012, from 2010 (40%)
  - Traffic flow and congestion concerns continued to fall in 2012 (15%) from 2010 (18%)
- **Satisfaction**
  - **2012 excellent satisfaction ratings with services rose to 33% in 2012 from 25% in 2010**

# Most Important Issues Facing The Woodlands Residents



Q46./Q39 Open-ended question

# Satisfaction with Services Provided by Township

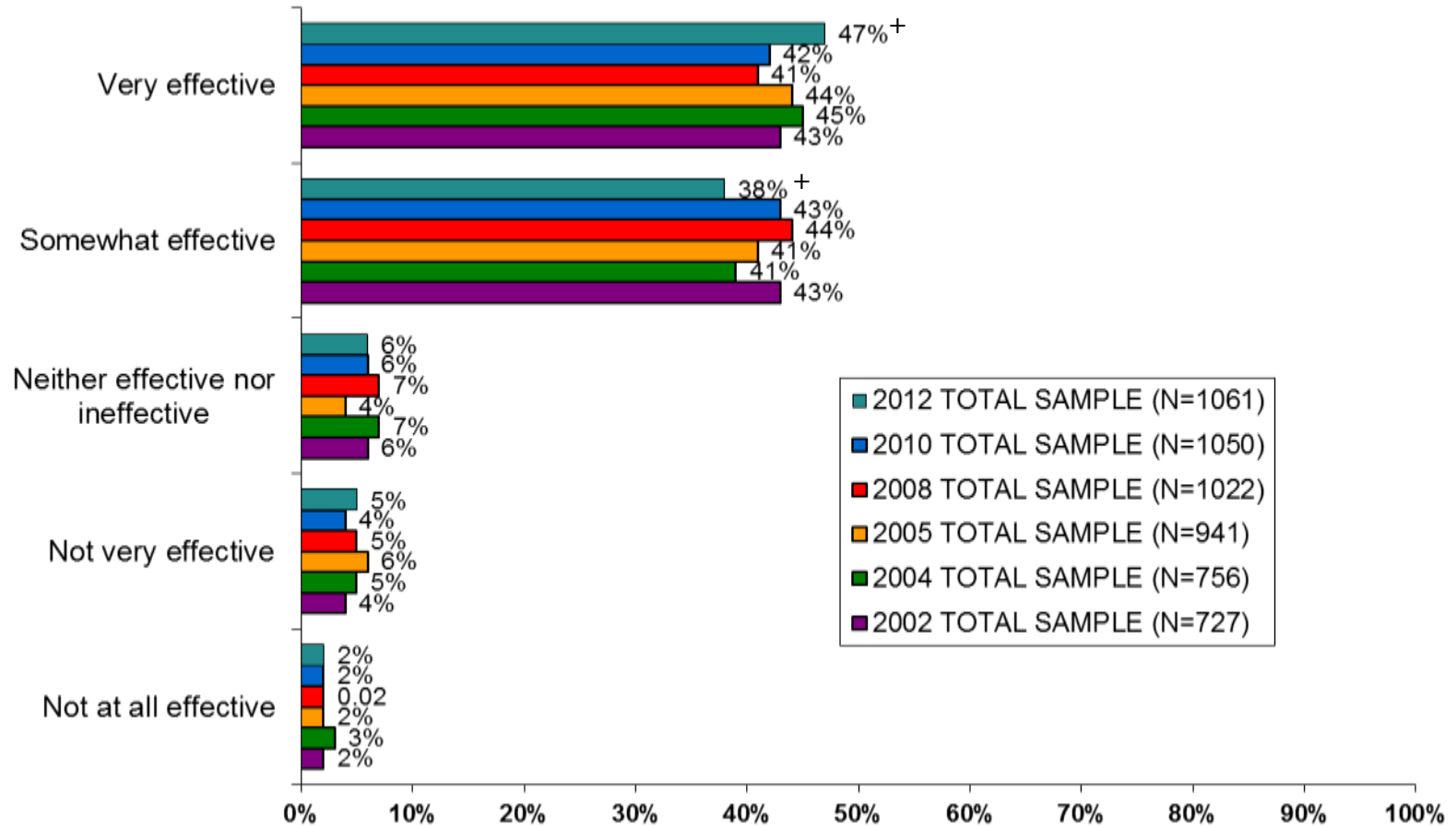


Q8. Closed-ended rating question

# Changes Since Previous Surveys

- Deed Restrictions
  - Consistent with previous surveys, residents continue to perceive that deed restriction enforcement is effective
    - However, a shift occurred from somewhat to very effective ratings
  - A majority of residents (65%) continue to state that deed restrictions are enforced about right
    - Of those who contacted The Township staff to complain, 19% were very satisfied with the response; a shift from 2010 (24%)
      - Similar to the previous survey, 28% are not at all satisfied with the results this time

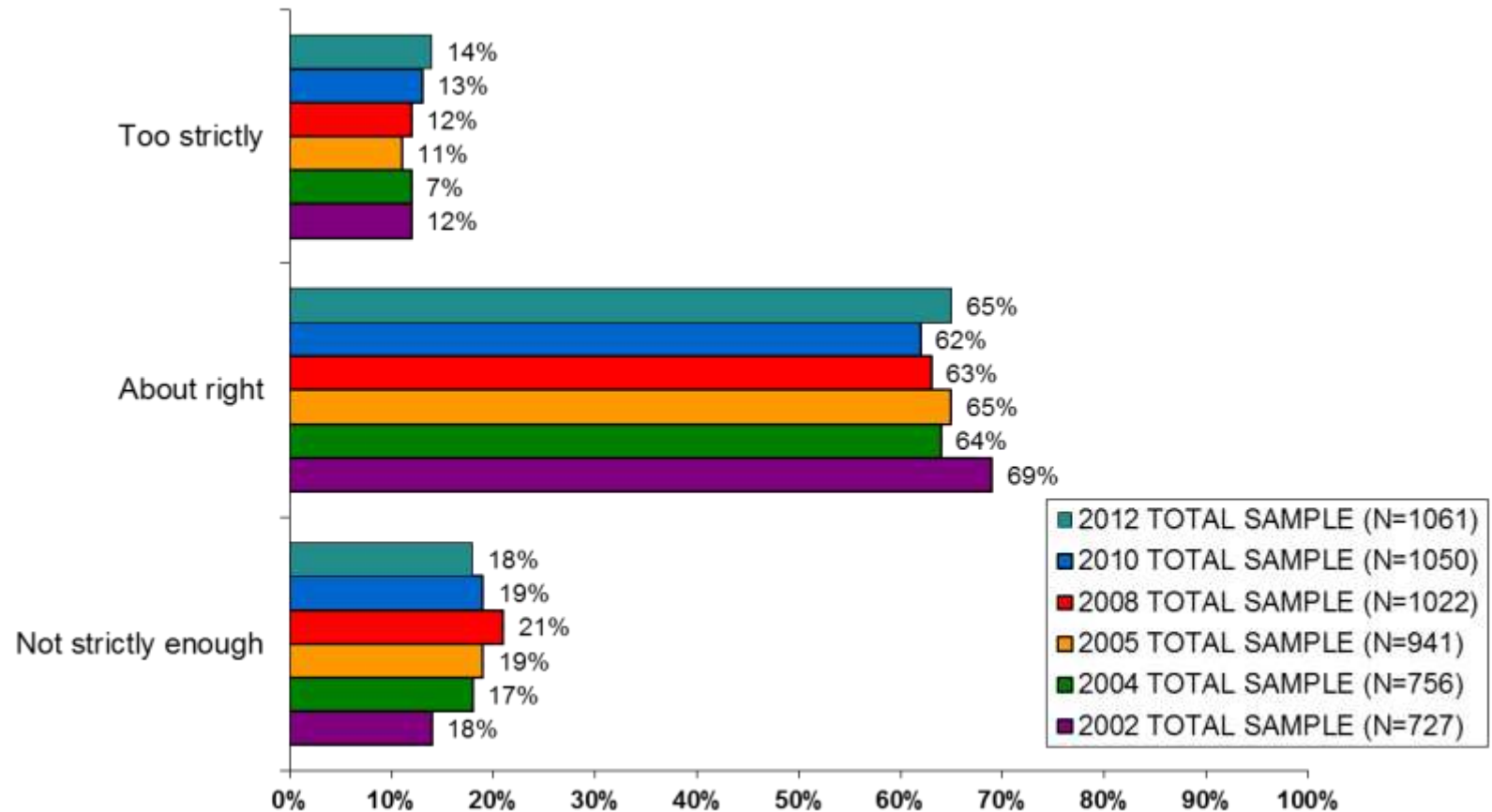
# Effectiveness of Enforcement of Deed Restrictions



Q16./Q13. Closed-ended

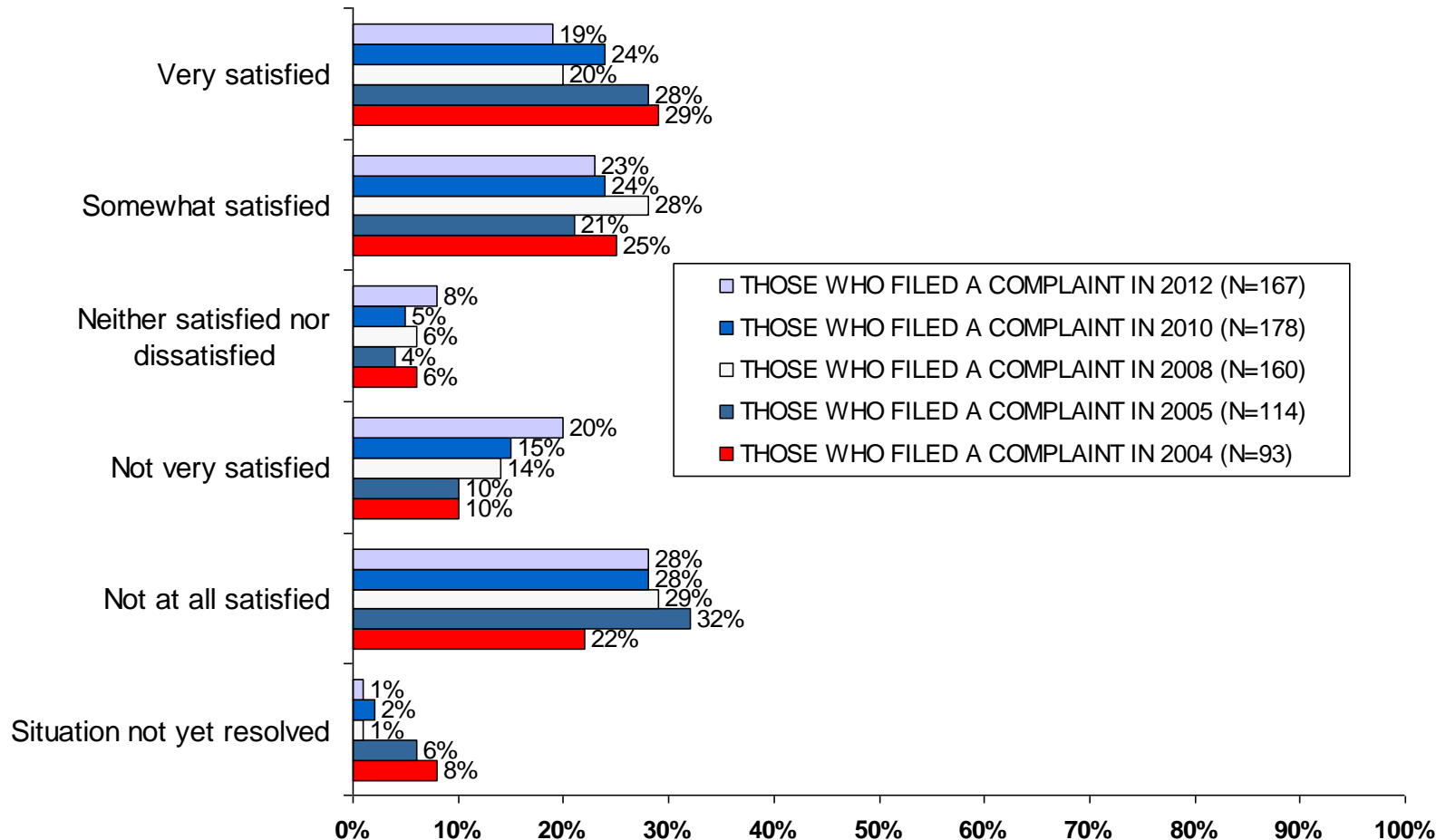


# Feel That Deed Restrictions Are Enforced...



Q18./Q15. Closed-ended

# Satisfaction with Response to Complaint Filed



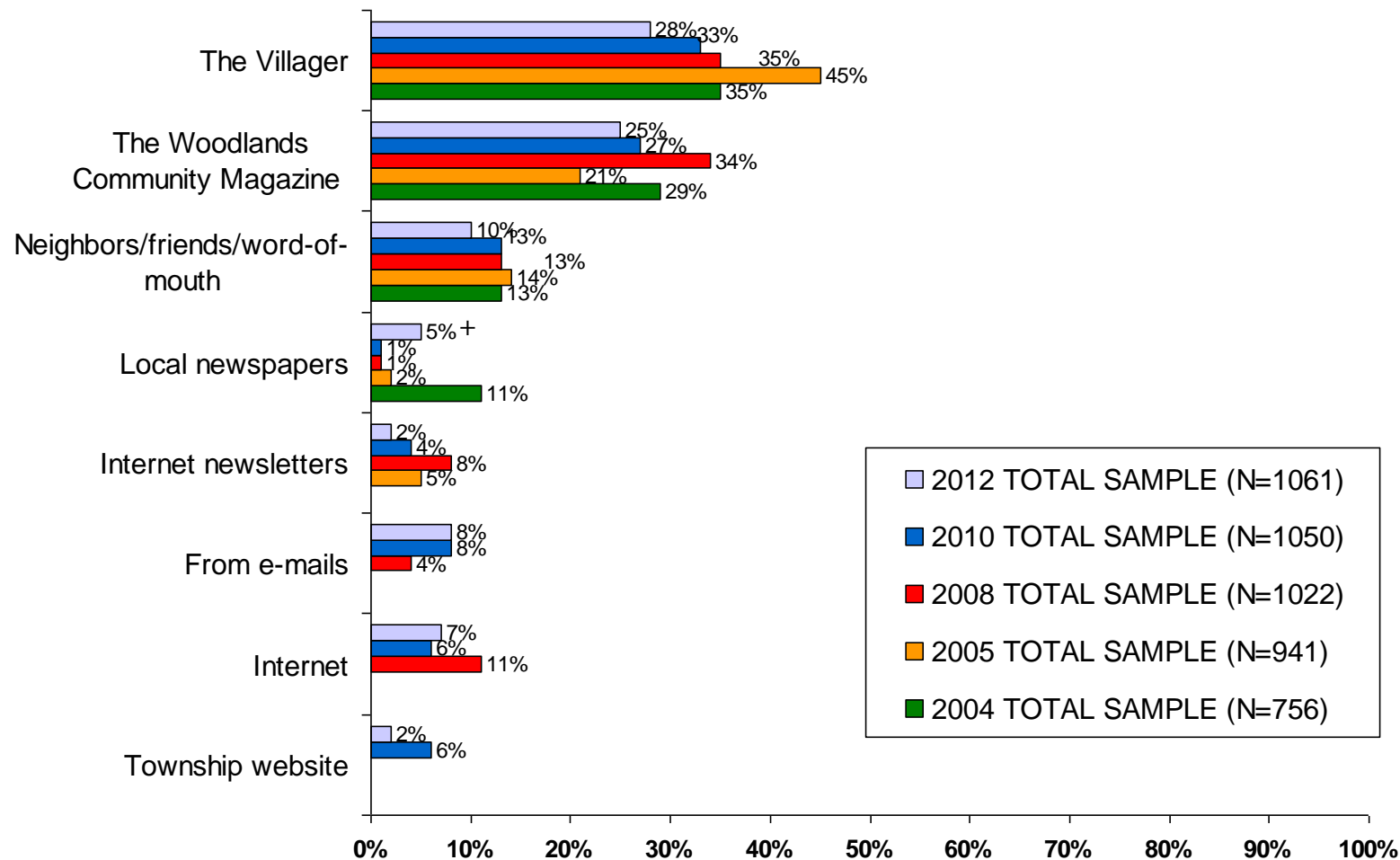
Q20./Q17. Closed-ended

# Changes Since Previous Studies

- Communication

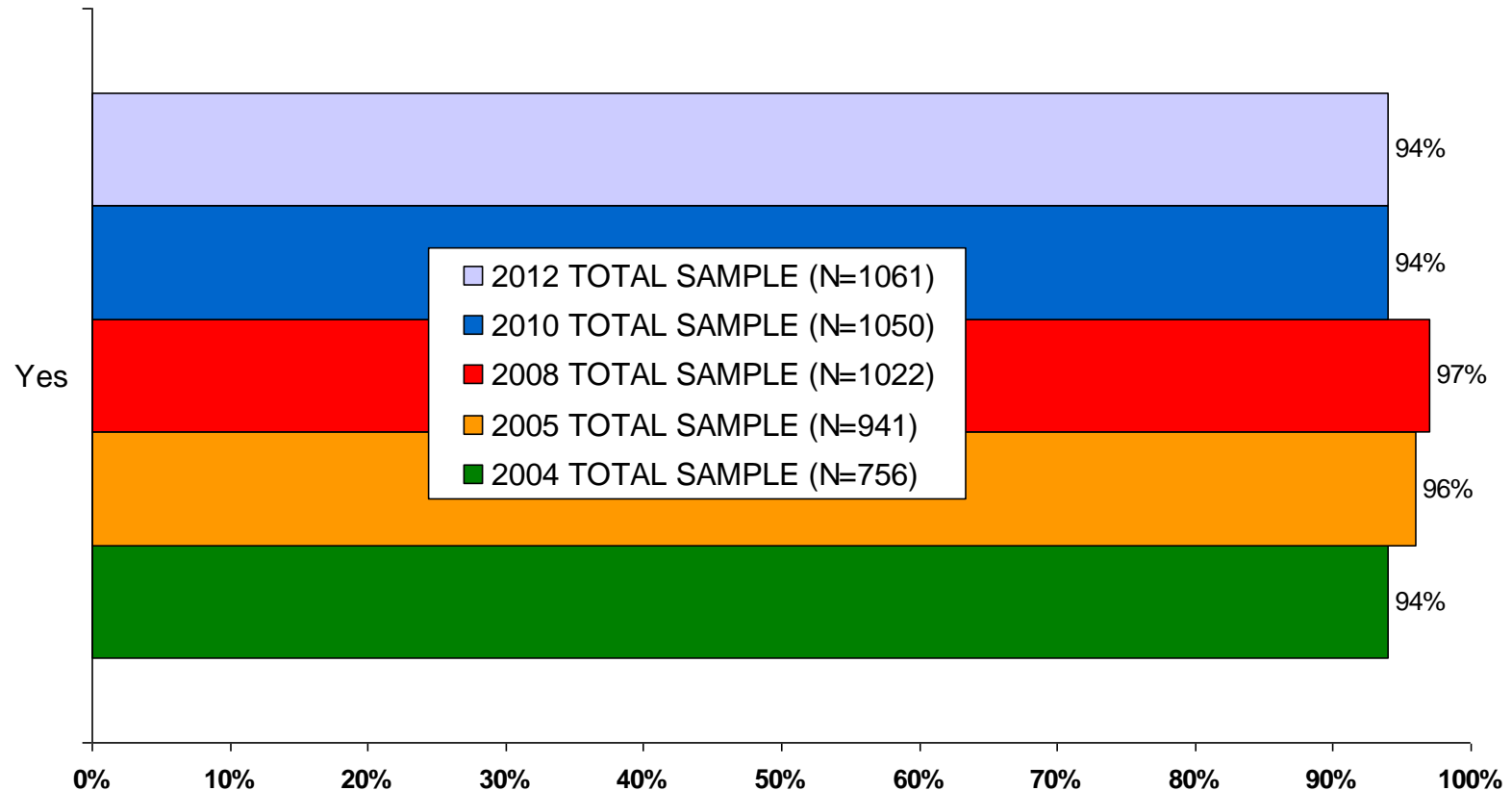
- Use of The Woodlands Community Magazine as a source of community activities remained consistent with 2010
  - Most continue to report receiving The Woodlands Community Magazine
  - Of those receiving the magazine, most read at least some of it
  - More (25%) compared to 2010 (20%), said they read all of it
- Thirty-six percent report contacting The Township Staff in 2012; reversing the declining trend from 2005
  - Overall ratings for Staff are more positive and residents rate timeliness as significantly better

# How Primarily Learn About Activities in Community



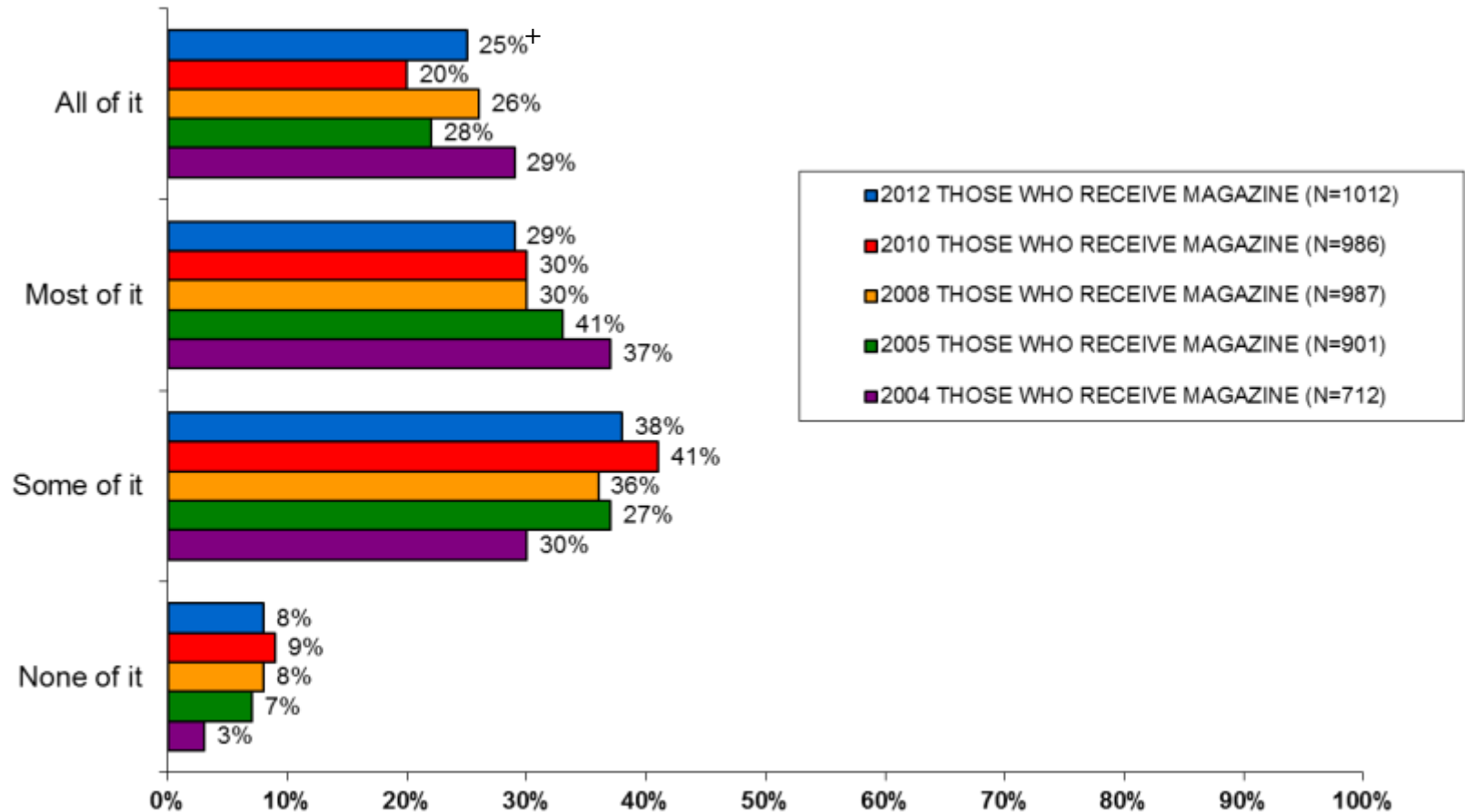
# Receive The Woodlands Community Magazine

2012 Resident Survey

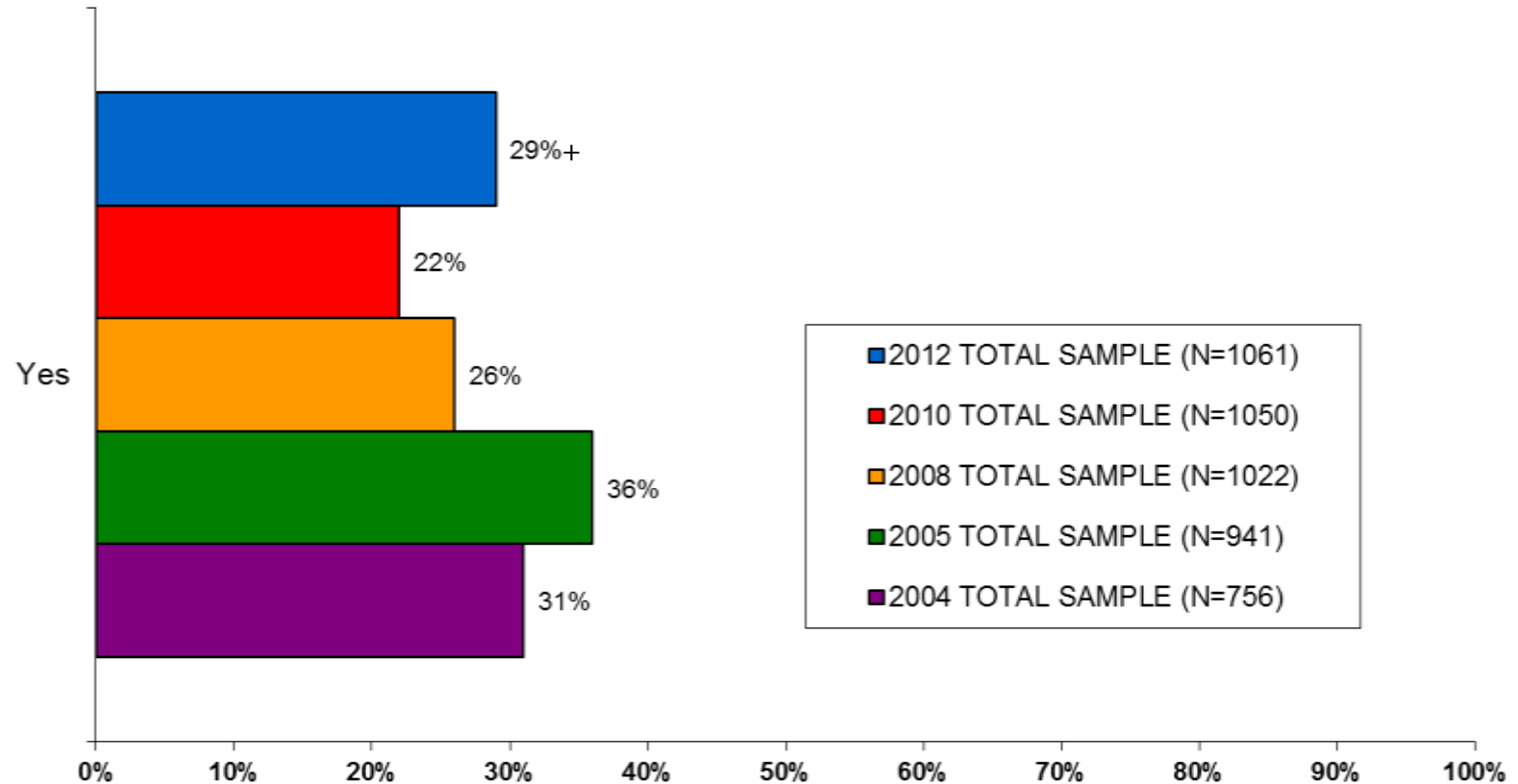


Q24./Q23. Closed-ended question

# When Receive Magazine, Typically Read...



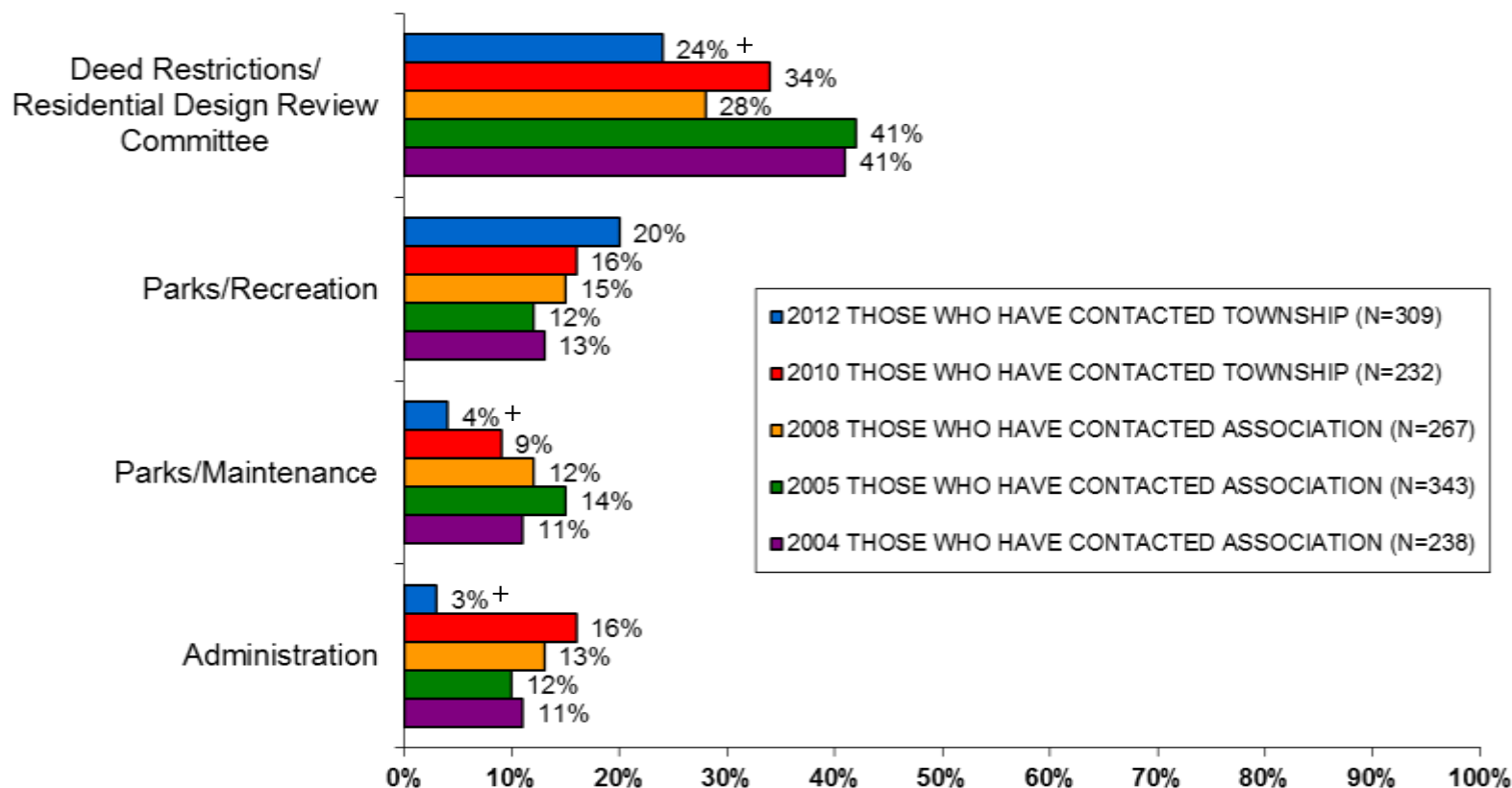
# In Past 2 Years, Have Had Personal Communication With Member of the Staff



Q35./Q26. Closed-ended question

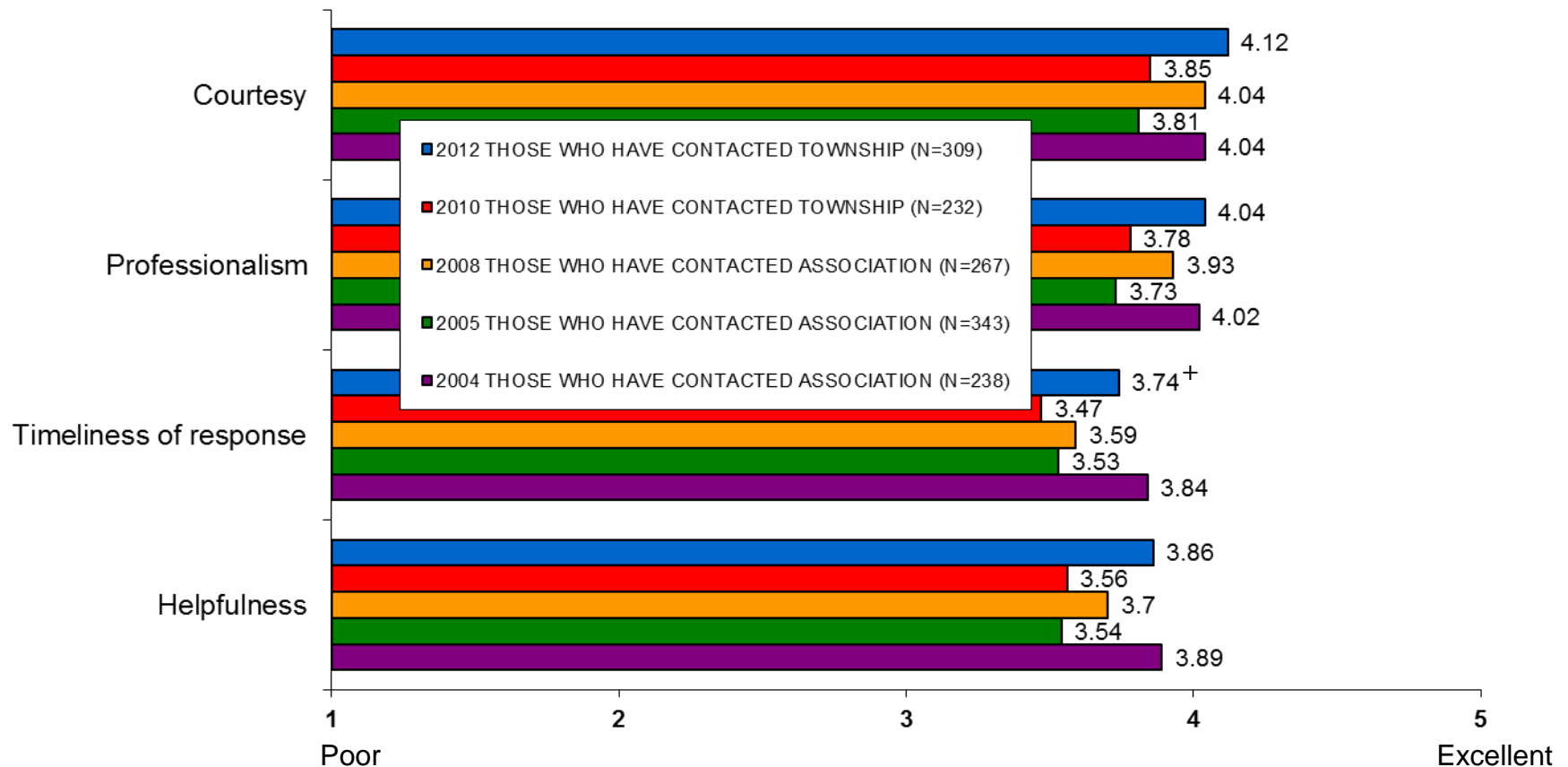
\*Note: Prior to 2010 stated past 5 years

# Departments Contacted





# Rating Staff Based on Communication (1 = Poor; 5 = Excellent)



Q37./Q29. Closed-ended rating question

# Questionnaire